

Nenna Salokangas

Cycling tourism research – analyzing the bicycle touring segment

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Abstract

Author: Salokangas Nenna

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Due to the lack of information about cycling tourists, the commissioner of the thesis, Ellare Oy, conducted an extensive survey-based study of the cycling tourism demand in Finland. The ultimate purpose of the study was to identify different cycling tourism segments, their needs and desires, and common behavioral patterns. Though the thesis has been written on the side of more comprehensive research, it has been decided to focus on bicycle touring only. The thesis aims to analyze and describe the geographical, demographic, psychographic, and behavioral characteristics of the current bicycle touring demand.

In addition to the secondary data research, primary data was collected through a quantitative online survey. The thematic content of the survey is based on the theoretical background of the study. The total primary data collected in autumn 2020 contains 1766 responses, wherefrom a sample size of 235 answers were separated for the thesis analysis.

Despite the large deviation among individual respondents, geographic, demographic, and psychographic similarities were found. The data analysis results indicate that, based on Cohen's tourist typology, the most likely tourist type among Finnish touring cyclists is 'explorer'. Furthermore, the research results show that the differences between each individual are notable. However, they do not align with Plog's theory, in which there is a symmetrical alteration between two extremes, 'psychocentric' and 'allocentric'. The data suggest the bicycle touring demand in Finland to be focused more on the 'allocentric' side.

The research generates new information about the bicycle touring demand in Finland and enables tourism players to develop customer-oriented cycling tourism products based on the study. The research results can be utilized in both cycling tourism productization and marketing.

Tiivistelmä

Tekijä: Salokangas Nenna

Työn nimi: Pyörämatkailututkimus – retkipyöräilyn segmenttianalyysi

Tutkintonimike: Restonomi (AMK), Matkailun koulutusohjelma

Asiasanat: retkipyöräily, markkinatutkimus, segmentointi, pyörämatkailun kehitys

Pyörämatkailijoista saatavilla olevan tiedon puutteellisuuden takia opinnäytetyön toimeksiantaja, Ellare Oy, toteutti laajan pyörämatkailun kyselytutkimuksen. Tutkimuksen perimmäinen tarkoitus oli tunnistaa erilaisia pyörämatkailijasegmenttejä, heidän toiveitaan ja tarpeitaan sekä selvittää miten he käyttäytyvät pyörämatkan aikana. Tämä opinnäytetyö on laadittu kyseisen laajan tutkimuksen rinnalla ja se käsittelee aineistoa rajatusti retkipyöräilyn näkökulmasta. Opinnäytetyön tavoite on analysoida ja kuvailla tämänhetkistä retkipyöräilijäsegmenttiä heidän maantieteellisten, demografisten ja psykografisten ominaisuuksien sekä käyttäytymismallien näkökulmasta.

Aikaisemmin julkaistujen tutkimusten, raporttien ja seminaarien lisäksi tutkimusaineistoa kerättiin kvantitatiivisella Internet-kyselyllä, jonka teemasisältö on määritelty tutkimuksen teoreettiseen taustaan vedoten. Kokonaisuudessaan syksyllä 2020 kerätty aineisto sisältää 1766 käyttökelpoista vastausta. Opinnäytetyön käyttöön rajattu 235 vastauksen aineisto käsittelee tämänhetkistä retkipyöräilijäsegmenttiä.

Suuresta yksilöllisestä vaihtelusta huolimatta, tutkimukseen osallistuneissa havaittiin maantieteellisiä, demografisia ja psykografisia samankaltaisuuksia. Tutkimustulosanalyysi osoittaa, että suomalaiset retkipyöräilijäsegmenttiin kuuluvat henkilöt ovat Cohenin matkailijatypologian mukaan matkailijakäyttäytymistyyppiltään todennäköisimmin tutkimusmatkailijoita ('explorer'). Lisäksi tutkimustulokset osoittavat, että vaikka yksilöiden väliset erot ovat suuria, ne eivät osoita samanlaista symmetristä vaihtelevuutta kuin Plogin matkailijatyyppin vaihtelevuusteoria ehdottaa, vaan on painottunut lähemmäksi teorian osoittamaa allosentristä äärimatkailijatyyppiä.

Tutkimustulokset lisäävät tietoa suomalaisista pyörämatkailijoista ja mahdollistavat matkailuyritysten asiakaslähtöisempien tuotteiden kehittämisen. Tutkimustuloksia voi hyödyntää sekä pyörämatkailun tuotteistamisessa että markkinoinnissa.

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List of abbreviation

ADFC	Allgemeiner Deutscher Fahrrad-Club (Eng. German National Cyclists' Association)
DMO	Destination Management Organization
GDP	Gross domestic product
IATA	International Air Transport Association
SDGs.....	Sustainable Development Goals
SVT	Suomen virallinen tilasto (Eng. Statistics Finland)
UNDP	United Nations Development Programme
UNEP.....	UN Environment Programme
UVT	Urheilun vähittäis- ja tukkukauppa ry (Eng. Sports Retail and Wholesale Association)
UNWTO.....	United Nations World Tourism Organization
WTO	World Tourism Organization (WTO until 2003, nowadays called UNWTO)
WTTC	World Travel & Tourism Council

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1 Introduction

This chapter aims to familiarize the reader with the background information and research problem. Creswell and Creswell (2018) define a research problem as a statement that leads to establishing a study. This section outlines the main characteristics of the commissioner, i.e., Ellare Oy. Furthermore, the purpose and focus of the thesis research are established. By providing the research framework, the chapter focuses on the significance of the research and awakens the readers' curiosity toward the topic.

1.1 Background and a problem statement

In recent years, the popularity of cycling tourism has increased dramatically (Business Finland, 2020). Even though the total number of tourists, both international and domestic, has decreased in 2020 as a cause of the Covid-19 pandemic (Ministry of Economic Affairs and Employment, 2020b), many cycling destinations such as the surrounding area of the lake Näsijärvi, lake Saimaa, the cycling routes around the Archipelago of Turku, and national parks around Finland have reported a significant increase in cycling visitor numbers. In fact, summer 2020 is said to be the cycling summer of all time. (Kaaja & Jorasmaa, 2020)

The increasing popularity of using a bicycle as a tool to go around can also be seen in the bicycle sales; bicycle trade has increased consecutively in recent years (Urheilun Vähittäis- ja Tukku kauppa ry, 2019). According to Finnish bicycle manufacturer Helkama, such growth as the one seen in spring 2020 has not taken place in decades (Tuhkanen, 2020). This trend is not only seen in bicycle sales but also in bicycle rentals; the number of rented fat bikes through Biking.com rentals in 2020 is three times larger than in the previous year (Kaaja & Jorasmaa, 2020). Besides, many cycling-related projects are taking place in 2020; cycling routes and other infrastructure such as Bike Parks have been a target of development, and Finnish cycling-related organizations have invested in internationalization projects (Jorasmaa, 2020).

It seems as if the trend of cycling tourism will continue growing (Räsänen, 2019). According to Roininen (2020), it may even become one of the key forms of tourism already in 2030. As on the side of a worth-seeing attraction, services and infrastructure are required for successful tourism (Roehl, Fesenmaier, & Fesenmaier, 1993), further development of cycling tourism destinations and cycling-friendly enterprises can be expected to take place. When developing cycling tourism, it is essential to know who is taking part in it, their specific needs and desires, and their behavioral characteristics when traveling (Sobek, 2020).

Internationally, many countries have executed a significant demand study to determine common characteristics and behavior among people taking part in cycling tourism. For example, a German organization, Allgemeiner Deutscher Fahrrad-Club (ADFC), has created an annual survey allowing the development and changes of the demand to be defined. Even though some destination-specific customer surveys have taken place (Aitamurto, 2020), there is still little data available about the cycling tourism demand in Finland (Roininen, 2020). Therefore, the commissioning party of the thesis, Ellare Oy, who has a vital role in outdoor activity tourism destination development in Finland, including cycling tourism, has decided to execute a comprehensive study to collect information about the cycling tourism demand.

1.2 Commissioning party: Ellare Oy

The thesis is commissioned by a small Helsinki-based tourism consulting company called Ellare Oy. Even though the company is small in the number of employees, it has a key role in tourism development in Finland, especially in outdoor activity destination development. Ellare Oy plans and executes destination development projects and organizes training and seminars for travel destinations, cities, and organizations. Ellare Oy has significant customers such as destination management organizations (DMOs), large travel destinations in Lapland, and a state-owned enterprise Metsähallitus. (Ellare, n.d.)

Ellare Oy also represents Outdooractive in Finland, a large German outdoor portal with over 8,5 million registered users. Indeed, in summer 2020, Outdooractive became the most extensive outdoor activity portal in Europe. (Ellare, n.d.) The portal brings a large variety of outdoor activity

routes and facilities near to them available for the user and allows destinations to increase their visibility among potential international and domestic tourists or locals interested in finding new routes or services.

1.3 Purpose and focus of the research

Due to the lack of information about the cycling tourists in Finland, Ellare Oy has decided to execute a large demand study. The ultimate goal of the study is to identify different cycling segments. The purpose of the research is to gain new information and a deeper understanding of the cycling tourism demand and answer questions such as who is taking part in cycling tourism and what kind of travel behavior they have? What kind of needs and desires they have? Furthermore, what is the potential of the cycling tourism industry in Finland? This comprehensive study adds significant volume to the current data about cycling tourism demand and will allow the creation of a study-based segmentation.

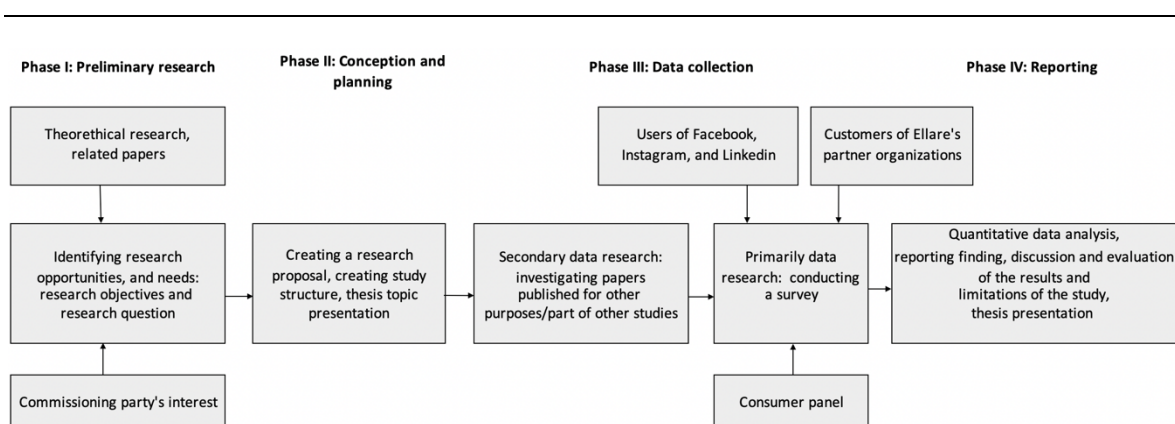
With the research-based information about the cycling tourism demand in Finland, Ellare Oy will develop its services and insights of its training to serve its customers better than before. Ellare's customers, DMOs, tourism organizations, and enterprises will then be able to develop cycling tourism to meet different segments' requirements. Therefore, the data collected through the research is to be used in the future development of cycling tourism in Finland.

As the study is a substantial and complex unity, and as the commissioning party wants to keep the majority of the results confidential, the thesis covers only a small part of the research. The thesis study has been decided to focus on bicycle touring demand in Finland. The thesis aims to find common patterns and characteristics among people taking part in bicycle touring and process the data to describe people who have already taken part in bicycle touring. Therefore, the research question to be addressed in the thesis is: What type of people are most likely to take part in bicycle touring tourism?

1.4 Structure of the thesis

The research structure has been divided into four main phases (Figure 1): preliminary research, conception and planning, data collection, and reporting. During the preliminary research phase, research opportunities and needs were identified, primarily based on the interest of the commissioning party. Also, topic-related papers published for other purposes and seminars set the industrial knowledge base in this phase. On the side of the preliminary research, the study structure was planned. A research proposal was also created, and the thesis plan was presented at the Kajaani University of Applied Sciences. The first two phases are reported shortly in *Chapter 1*.

Figure 1: Phases of the thesis process



Source: Adapted from Nunes & Miranda, 2013; Creswell & Creswell, 2018; Kamk, 2014

In the third phase, the data used in the research was collected. To create a comprehensive understanding of the cycling tourism demand in Finland, and to be able to answer the research question, primary and secondary data research was conducted. Secondary data research refers to investigating and using data and public records that were primarily collected for other purposes, such as industry content and research papers (Farese, 2020). The secondary data data used in the study is explained in Chapter 2, Chapter 3, and Chapter 4. In *Chapter 2*, the reader is familiarized with cycling tourism as a phenomenon and its positioning in the entire tourism industry. The study aims to understand and define differences within the cycling tourism demand; therefore, it is essential to understand the benefit of conducting a demand study. *Chapter 3* introduces the importance of demand studies and some common ways of dividing a total market into segments based on common

characteristics. While *Chapter 4* looks into tourism typologies that are commonly used in describing tourists.

In contrast to secondary data, primary data is defined to be data collected for the primary purpose of being used in the specific study. Primary data research includes research methods such as surveys, interviews, or experiments, in which the research team collects the information directly from the primary sources, the group of people studied in the research, or experiments conducted as part of the study. (Farese, 2020) Primary data used in this research was collected through a survey. The research methodology used in the study is explained in detail in *Chapter 5*.

The last phase of the research process is reporting, including recording findings, data analysis, and evaluation. A univariate data analysis was conducted, meaning that each variable was analyzed individually. In *Chapter 6*, each variable is presented in text and, when possible, in visual form. To answer the research question stated previously, descriptive data analysis had to take place. In *Chapter 7*, the findings stated in Chapter 6 are integrated into the tourism theories introduced in Chapter 4. It is also essential to evaluate the reliability and validity of the research; these factors are discussed in Chapter 7.

2 Cycling tourism

Tourism is one of the fastest-growing industries in the world (WTTC, as cited in Carter, 2018). According to UNWTO (2019), 2018 was the 9th consecutive year of sustained growth in the tourism industry, with 1.4 billion international tourism arrivals worldwide. However, based on the data from the first quarter of the year, international tourism numbers may decline by 60-80% in 2020, making it the worst crisis that international tourism has faced since 1950 (UNWTO, 2020a). Even though tourism recovery rates in previous crises such as the 9/11 attacks (2001), SARS (2003), and the Global economic crisis (2009) suggest that tourism can have a relatively fast recovery (UNWTO, 2020b), millions of jobs are at risk, and this may be a significant hit in the recent advancement made in the Sustainable Development Goals (SDGs) (UNWTO, 2020a).

SDGs are 17 goals created in 2015 that address global challenges from poverty and inequality to climate change, peace, and justice. They were created to continue the work that was started by the Millennium Development Goals. (United Nations, 2015) These goals have been implemented in tourism, and the role of tourism in achieving these global goals has been acknowledged. Tourism stakeholders are encouraged to take action toward a more sustainable tomorrow. Indeed, the impacts of the tourism industry are not all good; the growing number of tourist, international and domestic, generates not only a large amount of greenhouse gas emissions but has a negative impact on the host communities in terms of cultural assets, resource management, and economic leakages to name a few. (UNWTO & UNDP, 2017) However, the tourism industry is working on addressing the economic, environmental, and social issues occurring in the field and aiming “to make all tourism more sustainable” (UNEP & WTO, 2005, p. 11).

Sustainable tourism can be defined as “tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities” (UNEP & WTO, 2005, p. 12). Making tourism more sustainable is a continual process where these impacts and needs are taken into account in the planning, development, and operation of tourism (UNEP & WTO, 2005). When looking for ways to make the industry more sustainable, the potential of cycling tourism is often brought up (Gazzola et al., 2018; Weston & Mota, 2012).

This chapter aims to create a comprehensive understanding of cycling tourism as a phenomenon by first defining it and then discussing its economic, environmental, and social implications. The chapter also gives a brief situation analysis of cycling tourism in Finland.

2.1 Defining cycling tourism

There is no one definition available for cycling tourism; the tone of a definition changes depending on its creator (Duran, Sevinc, & Harman, 2018). The definition used in this research defines cycling tourism as “recreational visits, either overnight or day visits away from home, which involve leisure cycling as a fundamental and significant part of the visit” (Keeling, 1999, p. 1). This definition is used as it encompasses different types of cycling tourism, from mountain biking and long-lasting biking tours to day trips. Even though the primary data collected through the research includes different cycling tourism types, this paper will focus on the phenomenon of bicycle touring, which can be defined as traveling from point-to-point by bicycle for leisure purposes, staying away from home at least for a night (Pratte, 2006). Practically, the bike is the mode of transportation (Weston & Mota, 2012), while it also becomes a type of tourism (Lumsdon & Page, 2004). Tours can vary from weekend trips to months-long rides and involve any kind of lodging (Pratte, 2006).

2.2 Sustainable tourism development and cycling tourism

In the next three subchapters, the implications of cycling tourism are to be looked at from the points of view of the three main pillars of sustainability: economic, environmental, and social. It is to be emphasized that these dimensions overlap and significantly impact each other (UNEP & WTO, 2005); therefore, it may be difficult to categorize an impact under one dimension only. In this paper, each subchapter emphasizes one of the dimensions and may point out its connections to the other dimensions.

2.2.1 Economic impacts

Annual papers published by large international organizations often emphasize the positive economic impact of tourism. Indeed, tourism is a major economic player. According to WTTC (2020), the total contribution of travel and tourism to the world's gross domestic product (GDP), including direct, indirect, and induced impacts, was in 2019 8.9 trillion US dollars, with 10.3% of the global GDP. Also, one in ten jobs is created by the tourism industry, providing 330 million jobs worldwide (WTTC, 2020). According to Harcombe (1999), the economic impacts generated by tourism are considered mainly positive. Tourism generates foreign exchange and stimulates trade and income. Tourism increases the need for infrastructure and is likely to push city and regional development forward, increasing the destination's attractiveness with a wider variety of leisure activities, improvements in the road network, and an expanding number of office buildings and restaurants. The new infrastructure can also be used for non-tourism purposes and may offer new employment opportunities for the host community. The significant economic benefits generated by tourism often outweigh the negative features such as seasonality, over-dependency of tourism, and leakage. (Harcombe, 1999)

According to the European Parliament (2012), cycling tourism is often seen as an economically relatively sustainable type of tourism. This can be explained by cycling tourism taking place in such remote places, which are unlikely to be visited by people traveling by car or other forms of transportation. By bringing additional income to communities along the way that would not otherwise attract visitor spending, it contributes to the use of services in these locations. (European Parliament, 2012) A current megatrend is that people move from remote areas to larger places, from north to south (Korpela, 2018). As all people do not move by will, but for employment (Korpela, 2018), cycling tourism can support remote areas to maintain jobs and even create new employment opportunities (European Parliament, 2012). Many accommodation providers and shops along international EuroVelo cycling routes have reported positive business development taking place mainly due to the cycling tourism trade (Brown, 1997; BMVBW, 2002; Limbert & Matijašević, 2009).

In addition to the accommodation and food services needed to fulfill one's basic needs, cycling-related services such as bicycle rentals, luggage service, or bike parks and cycling-focused tour

operators provide new business opportunities (Hillo, 2020; Merilahti & Översti, 2020; O'Chucks, n.d.). Also, according to statistics by the in-2019-abolished Finnish organization Urheilun vähittäis- ja tukkukauppa ry (UVT), the total bicycle sales of UVT member organizations have increased in recent years. Especially, special featured and expensive bicycles have increased their popularity, offering a significant market growth opportunity in the bicycle and equipment sales (Moilanen, 2016). Notably, the share of electric bicycles from total sales has increased (Koponen, 2019). In 2018, a growth of 135% compared to the previous year was reported in sales of electric bicycles (Urheilun Vähittäis- ja Tukkukauppa ry, 2019).

Another variable worth mentioning is cycling tourists' spending; on average, cycling tourists spend more than overall tourists (Rajé & Saffrey, 2016). In France (EFC, 2018) and Germany, cycling tourists have been recorded to spend almost 20% more than the average for all tourists (Valtakunnallinen pyörämatkailureittityöryhmä, 2003) and in UK average cycling tourists spend around 9% more per head per trip (Rajé & Saffrey, 2016). However, it is important to point out that tourism is a highly seasonal activity, especially in northern locations such as Finland. Therefore, it is to be taken into account in the tourism planning and operation.

2.2.2 Environmental impacts

Concerning environmental impacts, tourism is often seen in a negative light, for a reason. Tourism generates a large amount of pollution, primarily through transportation and hospitality industries, and over-consumes natural resources (UNWTO, n.d.; Serrano-Bernardo et al. 2012). Lenzen et al. (2018) find in their study that the global yearly carbon footprint generated by tourism was four times higher than previously estimated. Based on the study, tourism's annual global carbon footprint increased from 3.9 to 4.5 billion tonnes of CO₂ equivalent between 2009 and 2013, accounting for 8% of global greenhouse gas emissions (Lenzen et al., 2018). The figures suggest that the tourism sector is a more significant polluter than the construction industry (Dunne, 2018).

According to the European Parliament (2012), emissions generated per cycling trip by German holidaymakers were 66% less than other holidays in 2008. The lower emissions are based on cycling tourists' preference to use more environmentally friendly transportation also when traveling to and

from the destination. Also, cycling tourists tend to travel shorter distances to get to the destination. Concerning travel mode, only 7% of German holidaymakers' cycling trips included air travel but generated almost 40% of all emissions. The accommodation types preferred by cycling tourists also show sustainable features and are estimated to generate 32% less emission than accommodation used by the mainstream. (European Parliament, 2012)

Concerning cycling as an activity, on the side of walking, cycling is not only the most common form of mobility powered by a human (Litman, 2003) but has been recognized as preeminent forms of travel with a low carbon emission (Chapman, 2007). The European Parliament (2012) points out that entirely emission-free cycling, however, is not. Throughout its life circle, from production to maintenance, a bicycle generates emissions. Also, cyclists have been calculated to produce a certain amount of CO₂ emission per kilometer. However, compared to mainstream travel, cycling tourism generates significantly fewer emissions. (European Parliament, 2012)

It is also important to remember that constructing new cycling routes and other physical infrastructure generates emissions and causes deforestation. Construction and maintenance of tourism infrastructure consume local water resources and impact the quality of water. Infrastructure also increases noise and air pollution and disturb wildlife. (GhulamRabbany et al., 2013) Though there is no way to construct infrastructure with no emissions and no impact on nature, the level of pollution can be reduced by utilizing old, disused railways and old country tracks in developing a cycling network (Gazzala et al., 2018). Besides, the constructed infrastructure will also benefit the host communities by increasing the destination's functionality, growing the free-time activity selection, and generating new job opportunities (Harcombe, 1999). The development of infrastructures needed for cycling tourism will benefit the tourists, the entrepreneurs along the route (Jääskeläinen, 2018), and the local community (European Parliament, 2012).

2.2.3 Social impacts

In addition to the economic and environmental dimensions, it is essential to take social impacts into account. The social implications of tourism refer to the impact caused by the direct and indirect association between the host community and the tourists. These include but are not limited to

implications such as a change in the value system, individual behavior, family relationships, collective lifestyle, moral conduct, traditional ceremonies, and community organization. Each individual in the host community has their own attitudes and perceptions, which vary from positive, through no impact at all to negative. Therefore, the social impacts of tourism are difficult to assess, and many are still unknown. (Pizam & Milman, 1986)

When planned and managed correctly, economic income generated through tourism encourages some positive social impacts to occur. The host community will benefit from improved infrastructure, easier accessibility by the more comprehensive road network, increased availability of leisure activities, and employment opportunities. The combination of an increasing number of local services and an increased employment rate is likely to improve the host community's quality of life. At its best, tourism encourages the host community to preserve their traditional culture, customs, and handicraft, which may then lead to stronger community pride. In addition, cross-cultural interaction between the host and guest promotes understanding and awareness of global issues. However, all the positive factors can be turned into negative. Tourism may have a role in generating a higher crime rate by introducing the destination with bad behavior such as alcohol, drugs, and prostitution. Tourists' ignorant behavior may outweigh the host community's culture and values, causing a loss of cultural identity. (Vanclay, 2001)

Many studies undertaken in communities along cycling routes report social benefits to the users, businesses, and the host community (European Parliament, 2012). Residents near such routes have been said to be grateful, especially for recreational gain (Parker, 1998; Lumsdon, Downward, & Cope, 2004). Also, additional research supports the positive association between cycling routes and the quality of life of the host communities along them (Schafer, Lee, & Turner, 2000).

Another notable social impact is the health benefits of cycling. Regularly performed physical activity is generally known to have many positive impacts on health, such as reducing the risk of developing diabetes, high blood pressure, colon, and breast cancer. It also helps in weight control and positively impacts one's psychological well-being. (European Parliament, 2012) In addition to personal gain, the decrease in health issues caused by an inactive lifestyle will benefit the government. Citizens having a more active way of living will decrease healthcare expenses; therefore, it will generate savings for the government. (Liikenne- ja viestintäministeriö, 2018)

2.3 Cycling tourism in Finland

In this subchapter, the recent evolution of the cycling tourism demand and development of cycling-related infrastructure in Finland are discussed.

2.3.1 Cycling tourism demand

Tourism and the world economy are currently facing an unprecedented international health crisis caused by the Covid-19 pandemic (Ministry of Economic Affairs and Employment, 2020a). Travel restrictions set as precautions against the epidemic have had significant impacts on the world economy and people's ability to travel, especially internationally (IATA Travel Centre, 2020). According to the Ministry of Economic Affairs and Employment (2020b), the share of domestic tourism demand from the total tourism demand in Finland has risen up to 75% in 2020, when it has been nearly 55% before the crisis. Still, caused by the lack of work-related trips, the domestic tourism demand is estimated to decrease by 20% in 2020 (Ministry of Economic Affairs and Employment, 2020b). However, in light of statistics from previous crises, tourism may recover relatively fast (UNWTO, 2020b), domestic tourism faster than international travel (Ministry of Economic Affairs and Employment, 2020b).

Even though the tourism industry, in general, has faced a significant decrease in tourist numbers, many cycling destinations in Finland have reported a substantial increase in sales. (Kaaja & Jorasmaa, 2020) Zambito (2020) argues that some trends, such as the use of online grocery stores, forecasted to grow in the next five years, have had a faster growth rate due to the Covid-19. Because of the Covid-19 regulations, the number of activities available has decreased, and social distancing has become the motto of the pandemic times, nature activities have become more popular, and national parks have been visited more than before (Sandell, 2020). This dramatic increase in interest in nature activities includes cycling. However, cycling tourism had been growing even before the health crisis (Lamminen, 2020); even before the Covid-19 pandemic, cycling tourism had been forecasted to become one of the key forms of tourism by 2030 (Roininen, 2020).

According to Taneli Roininen (2020), the popularity of cycling tourism in general, but especially bicycle touring, started to grow in the mid-2010s. Since then, cycling in general and cycling as a form of tourism have become more and more popular, and it seems to be only an increasing trend (Räsänen, 2019). According to the Finnish organization Matkailualan edistämiskeskus (2008), when looking at cycling from the tourism industry's point of view, bicycle touring and mountain biking are the most significant forms of cycling. Also, bicycle as a tool to do sightseeing has become increasingly popular (Matkailualan edistämiskeskus, 2008). As an industry player generating economic income, the potential of cycling tourism can already be seen in statistics published by the European Parliament in 2012. In 2012, 1,14 million cycling trips, including at least one night away from home, were made in Finland, and the value of the market was 500 million euros (European Parliament, 2012). To demonstrate the significance of the potential in cycling tourism in Finland, it is worth mentioning that the total value of the tourism industry in Lapland in 2019 was a bit over a billion (House of Lapland, 2019), only double the value of cycling tourism eight years earlier.

Roininen (2020) identifies the increasing popularity of cycling tourism to be explained by the current lifestyle and traveling trends; travelers are looking for authentic, adventuresome, unique, and sustainable experiences close to nature. Also, the relatively recent technological advancement in navigation systems and improvements in cycling equipment such as the availability of ultralight gear (Roininen, 2020) or electric bikes (CBI Ministry of Foreign Affairs, n.d.) have supported the development of cycling tourism. The development in equipment has made cycling easier accessible for a larger audience, as now it offers lighter and faster mode of travel, and one does not need to be extremely sporty to take part in it (Roininen, 2020; CBI Ministry of Foreign Affairs, n.d.). Though the recent development of cycling tourism has been positive, the world is in an interesting stage, where there is no going back to the old, but no one knows how the global health crisis will impact customers' buying behavior (Zambito, 2020).

2.3.2 Cycling tourism development

The popularity of cycling tourism has increased since the 1990s, and it has become a significant form of tourism in Central (Keeling, 1999). Based on a model created by the European Parliament

(2012), population density and the amount of tourism infrastructure associate enormously with the number of cycling trips and revenue generated by them. In cycling tourism, tourism infrastructure includes an attractive and safe cycling network (Aschauer et al., 2019). Finland is included in the countries with lower potential, as previously mentioned, still, a rather high potential, while high-density countries such as Germany and Poland show higher potential in cycling tourism (European Parliament, 2012). This is supported by a study by Weston and Mota (2012), in which they state that the "demand tends to occur where good networks of cycle routes exist" (p. 1).

According to Jääskeläinen (2018), the current stage of cycling-friendly route infrastructure is not sufficient in Finland; cycling routes are poorly marked in the terrain, if at all, and a large part of the current signs are out of date. The party responsible for the maintenance often does not have the necessary resources to keep up. In addition, information and brochures available are often out of date and generally difficult to get access to. Jääskeläinen (2018) also states that cycling tourism tends to focus on the areas where there is information available.

Ministry of Transport and Communication published a walking and cycling development project in 2018, in which cycling tourism is identified as one of the targets of development. According to the document, between 2019-2021, international and national cycling routes are to be marked in the terrain based on the new Traffic Code. Also, to increase the accessibility and ease of the cycling routes' marketing, digitalization is to be used for the benefit (Jääskeläinen, 2018). In addition, a large number of cycling-related projects are taking place in 2020; cycling routes and other infrastructure such as Bike Parks have been a target of development, and Finnish organizations have invested in internationalization projects (Jorasmaa, 2020). As a major increase in the cycling tourism demand has been recorded and infrastructure plays a crucial role in facilitating tourism, further development of cycling tourism facilities can be expected to take place in the upcoming years.

3 Market segmentation

Business success is often based on the company's profitability. For a company to make a profit, it has to sell products or services to the customer. On the other hand, for a customer to buy the item or experience, it needs to add value to the customers' life by solving a problem or enabling to achieve a desired outcome. (Miettinen & Koivisto, 2009) It is widely known that people as customers find different things appealing; their needs and desires vary from person to person, and so make their buying patterns (Kotler, Bowen, & Makens, 2014).

Market segmentation offers companies a tool to strengthen their brand identity and determine what kinds of products to make (Yankelovich & Meer, 2006). Generally, "market segmentation is to divide a market into smaller groups of buyers with distinct needs, characteristics, or behaviors who might require separate products or marketing mixes" (Lamb, Fair, & McDaniel, 2003, p. 214). At its best, market segmentation is to guide companies in tailoring their offerings to meet the needs and desires of the people most likely to purchase (Yankelovich & Meer, 2006). Indeed, in addition to the sustainability factor discussed in Chapter 2, the tourism demand's needs and desires are essential to take into account when developing a tourism destination. In this chapter, different segmentation methods are introduced.

Though "there is no single way to segment a market" (Kotler & Armstrong, 2012, p. 215), Middleton (2002) argues the primary bases of segmentation to be demography, geography, behavior, lifestyle, personality, and benefits sought. Similarly, Kotler and Armstrong (2012) propose geographic, demographic, psychographic, and behavioristic characteristics to be the four most significant variables when segmenting a market. As Middleton's categories can be seen as subcategories of the ones Kotler and Armstrong had defined, the difference between the four variables identified by Kotler and Armstrong (2012) will be discussed in this chapter.

It is argued that people living in the same region are likely to share some wants and needs, which may be very different when comparing to other areas. Geographic segmentation is based on this belief. In geographic segmentation, the total market is divided based on their geographic unit; depending on the study, the scale can differ from continents and countries to cities and

neighborhoods and anything between them. By segmenting the market into geographic units, high demand and low demand locations may be found. (Martin, 2011) Though geographic segmentation is considered easy to obtain with low-cost, geographic segmentation does not give any other information and is therefore not recommended (Weinstein, 1994).

Demographic segmentation generally refers to demographic and socio-economic factors. Demographic segmentation differentiates people by their age, gender, income, education, religion, and life-cycle stage. Demographic segmentation is one of the most commonly used ways of creating segments, probably because the factors are relatively easy to identify and measure (Gunter & Furnham 1992; Kotler & Armstrong 2001). However, research results that rely only on demographic characteristics have been criticized for their inaccuracy (Straughan & Roberts, 1999).

Another method to divide people into submarkets is psychographic segmentation. Psychographic segmentation research examines people's values and lifestyle (Gunter & Furnham, 1992) and focuses on factors such as social class, political orientation, and personality characteristics (Straughan & Roberts, 1999). However, there is no clear definition of what constitutes as psychographic (Weinstein, 1994). Psychographic segmentation research is often seen as a more accurate way of differentiating people (Straughan & Roberts, 1999), especially when combined with geographic or demographic information (Gunter & Furnham, 1992; Weinstein, 1994), yet significantly more expensive to conduct than geographic and demographic segmentation study (Weinstein, 1994).

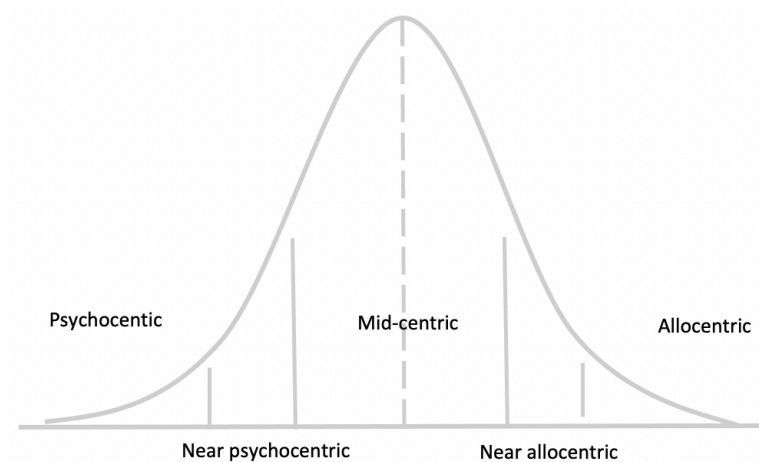
Behavioral segmentation can be divided into product usage and product benefit segmentation. Product usage studies the purchasing patterns, while product benefit focuses on the benefits the product generates and the frequency of using it. As the product needs to provide some sort of benefit or increased value to the consumer, it is important to be aware of the benefit sought. Product benefit segmentation is found to be the most accurate way of segmentation as it provides the information of the wanted benefit. Though product benefit segmentation is an efficient way of segmentation, like psychographic segmentation, it is an expensive research method and may cause difficulties in the data collection and analyzing phase. (Gunter & Furnham, 1992; Weinstein, 1994)

4 Tourism theories

In addition to the four most significant focus variables introduced in Chapter 3, previous tourism studies offer theories that aim to divide tourists into segments by categorizing them based on different variables. In this chapter, two well-known tourism typologies, Plog's psychographic personality types and Cohen's phenomenology of tourism experience will be explained.

In the mid-1970s, Stanley Plog suggested that tourists with different personality traits seek different travel experiences, select various travel forms and types of destinations. The typology divides tourists into segments based on their interests, needs, and behavior. In this typology, Plog divides tourists into two extreme types, psychocentric and allocentric, the majority of the in-between being mid-centric (Figure 2) (Cooper et al., 2005). Allocentric refers to adventurous people seeking new places to explore. Allocentric people tend to be active, energetic, and outgoing in their daily life. High self-confidence is another feature used in describing allocentric people. In contrast, psychocentric tend to be anxious, self-inhabited, non-adventuresome, and concerned. However, many people have some allocentric and psychocentric characteristics and are located between these two extreme types. Indeed, the majority population is an intermediate between the two extremes. (Plog, 2001)

Figure 2: Plog's psychographic personality types

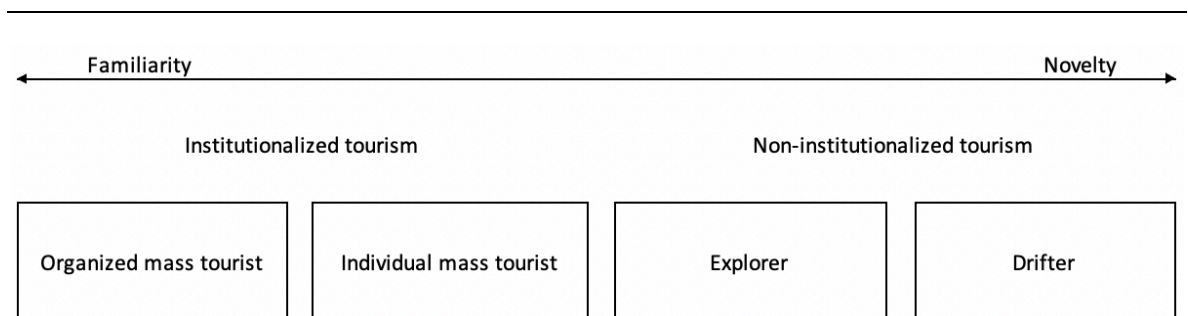


Source: Adapted from Plog, 2001

Another well-known, if not the best-known tourism typology, is the tourist classification created by Erik Cohen in 1972. Cohen divides tourists into four categories organized mass tourist, individual mass tourist, explorer, and drifter (Figure 3). These segments differ from each other by the levels of curiosity, the need for new experiences, preference for familiarity, and the need for security. He has defined the extremes as 'security, familiarity, and intimacy,' while the total opposite is 'curiosity, new experiences, and novelty.' (Cooper et al., 2005)

Organized mass tourist is highly dependent and prefers all-inclusive package holidays. This type of tourist is the least adventurous and values familiarity and comfort of their isolated 'environmental bubble' (Vuoristo, 2002, p. 48). A typical organized mass tourist is passive; the itinerary is determined in advance, and all stops are guided. Individual mass tourists also prefer package holidays, and all major arrangements are taken care of through a travel agency. The entire itinerary is not fixed beforehand, making them slightly more autonomous and flexible than an organized mass tourist. Comfort is still an important matter, and exploring the place is not the primary reason to travel. Cohen categorizes organized and individual mass tourists as institutionalized tourism based on their preference for using services provided by tour operators and travel agencies. (Cooper et al., 2005)

Figure 3: Cohen's phenomenology of tourism experience



Source: Adapted from Fletcher et al., 2018

In contrast to the organized and individual mass tourists, explorers arrange their trips themselves. Rather than traveling to mass tourism destinations, an explorer is interested in the local culture. However, explorer values a certain level of security and reasonable comfort for accommodation and transportation. Simultaneously, drifters take the step further to the unknown and wish to immerse themselves in the host community by trying to live like a local. Drifters plan their trips

themselves and prefer not to have any tight schedules on their travels. As explorers, drifters take care of all the travel arrangements themselves; therefore, Cohen has categorized these types of tourists under non-institutionalized tourism. (Cooper et al., 2005)

There are several interfaces in Cohen's and Plog's travel typologies. The organized mass tourist in Plog's psychographic personality types complies with the psychocentric in Cohen's typology, while the drifter refers to the allocentric type. (Vuoristo, 2003) According to Vuoristo (2003), the explorer can be identified as the near allocentric and individual mass tourist compares with the mainly mid-centric type.

5 Research methodology

In this chapter, the research methodology behind the chosen research method is explained. Also, the target group and distribution channels are introduced. As the thesis is not to analyze all the data collected, the criteria for the included data are also identified.

5.1 Research method and design

Research methods are commonly divided into quantitative, qualitative, and mixed methods (Creswell & Creswell, 2018). Creswell and Creswell (2018) explain the methods often to aim for different results. When a quantitative research method is usually used to test a theory's validity, a qualitative approach is used to generate them, and mixed-method research may do both (Creswell and Creswell, 2018). According to Creswell and Creswell (2018), survey and experimental studies are quantitative research methods. Quantitative surveys help to answer (a) descriptive questions, (b) questions about an association between variables; and (c) questions about a relation between variables over time that can be predicted. Experimental studies systematically manipulate one or several variables in order to find out the implication of the manipulation on the outcome. In contrast to quantitative research, qualitative research uses open-ended forms of data collection. Typical methods used in qualitative research are interviews, observation, documents, and audiovisual information. Also, qualitative methods rely on text and image data. A study using qualitative methods often aims to develop a complex picture of the problem that is studied. (Creswell & Creswell, 2018)

As the research aims to provide a quantitative description of the people taking part in cycling tourism or people interested in it, the primary data used in the study was decided to be collected through a survey. The questions included in the questionnaire were to provide information about the respondents' demographics and geographic location, general information about them as cyclists, and their cycling travel behavior now and in the future (Figure 4). As the thesis is done on the side of a more comprehensive study, the thesis did not cover all the questions on the research questionnaire. Only the 17 questions discussed in the thesis are published with it (Appendix 1).

Figure 4: Structure of the survey

Nr.	Insight of the question	Level of measurement	Segmentation	Tourism theory	Source of inspiration/input *
Background information					
Q1	Gender	Nominal scale: 3 options	Demographic	X	Kotler & Armstrong, 2012; Dolnicar & Leisch, 2008
Q2	Year of birth	Interval scale: drop-down menu	Demographic	X	Kotler & Armstrong, 2012; ADFC, 2020; Brenton et al. 2013
Q3	Place of residence	Nominal scale: drop- down menu	Geographic	X	Kotler & Armstrong, 2012; Self-created, Innolink
Q4	Type of household	Nominal scale: 5 options	Demographic	X	Self-created
Q5	Level of education	Ordinal scale: 5 options	Demographic	X	SVT, 2019
Q6	Gross income	Ratio scale: 5 options	Demographic	X	Statistics Finland, 2020
Q7	Stage of physical health	Ordinal scale: 5 options	Psychographic	X	Innolink
Q8	General cycling frequency	Ordinal scale: 5 options	Psychographic	X	Innolink
Q9	Bicycles currently available in use	Nominal scale: 9 options, allowed to choose as many as applicable	Psychographic	X	ADFC, 2020; brainstorming with Ellare
Cycling tourism					
Q10	Frequency of cycling holidays	Ordinal scale: 5 options	Behavioristic: Product benefit	X	Brainstorming with Ellare; Self-created
Q11	Travel companion	Nominal scale: 6 options	Behavioristic: Product usage	X	ADFC, 2020
Q12	Level of pleasure generated by 17 different variables (a) local attractions (nature/historic sights) (b) cultural attractions (c) new terrain (d) magnificent landscapes (e) marketplaces and boutiques (f) retail stores (g) local events (h) time spent in nature/outdoors (i) local people (j) break in a café (k) restaurant food (l) spa/other wellbeing services (m) cycling as a sport performance (n) development of cycling skills (o) specific cycling route (p) other cyclists (q) learning new skills / techniques	Ordinal scale: scale 1-5	Behavioristic: Product benefit	Plog's psychographic personality types; Cohens's phenomenology of tourism experiences	Items a-b: Brainstorming with Ellare, Innolink; Items c, g, i: Plog, 1974**, self-created; Items d, h, k: Rodríguez, 2019; Item e-f: Plog, 1974**, brainstorming with Ellare, Innolink; Items j, l-n, p-q: Brainstorming with Ellare; Item o: ADFC, 2020

Q13	Impact of 7 different variables on the destination choice (a) cycling tourism network (b) all-inclusive packages (c) last-minute discount (d) reviews and recommendations (e) destinations' conspicuousness (f) single attraction (g) easy accessibility	Ordinal scale: scale 1-5	Behavioristic: Product usage	Plog's psychographic personality types; Cohens's phenomenology of tourism experiences	Item a: Plog 1974**, brainstorming with Ellare; Item b-c: Expedia group, 2017; Item d: Plog, 1974**, Expedia group, 2017; Item e: Delski & Nasierowski, 2017; Item f: Plog, 1974**, self-created; Item g: ADFC, 2020, Debski & Nasierowski, 2017
Q14	Distance of the destination	Ordinal scale: scale 1-5	Behavioristic: Product usage	X	Innolink
Q15	Preferred landscape	Nominal scale: 8 options, allowed to pick 1-3 options	Behavioristic: Product usage	X	Innolink
Q16	16 variables describing a person type (a) finding a suitable destination (b) preference on guided tours (c) sensualist/challenge (simple present) (d) sensualist/challenge (2. conditional) (e) amount of cycling holidays (f) accommodation (g) own/rental bicycle (h) length of the holiday (i) daily distance (j) other activities (k) booking phase (l) route planning (m) travel companion (n) seasonality (o) cycling-friendly services (p) costs	Interval scale: Bipolar Matrix Table, a five-point rating scale	Psychographic / Behavioristic: Product usage	Plog's psychographic personality types; Cohens's phenomenology of tourism experiences	Items a: Expedia group, 2017; Item b: Plog, 1974**; Item c: Innolink, Plog, 1974**; Items d-e: Innolink; Item f: Plog, 1974**, brainstorming Ellare, Innolink; Item g, m, o: self-created; Item h: Rodríguez, 2019; ADFC, 2020; Item i: Rodríguez, 2019; Item j: Brainstorming with Ellare; Item k: Plog, Expedia group, 2017; Item l, n: Plog, 1974**, self-created; Item p: Brainstorming with Ellare, Debski & Nasierowski, 2017
Q17	Future development of cycling tourism activity	Ordinal scale: 5 options	Behavioristic: Product benefit	X	Innolink

* Though most questions have been inspired by secondary data research, all questions are formed in cooperation between the author of the thesis, the commissioning party - Ellare Oy, and the party responsible for the customer panel - Innolink.

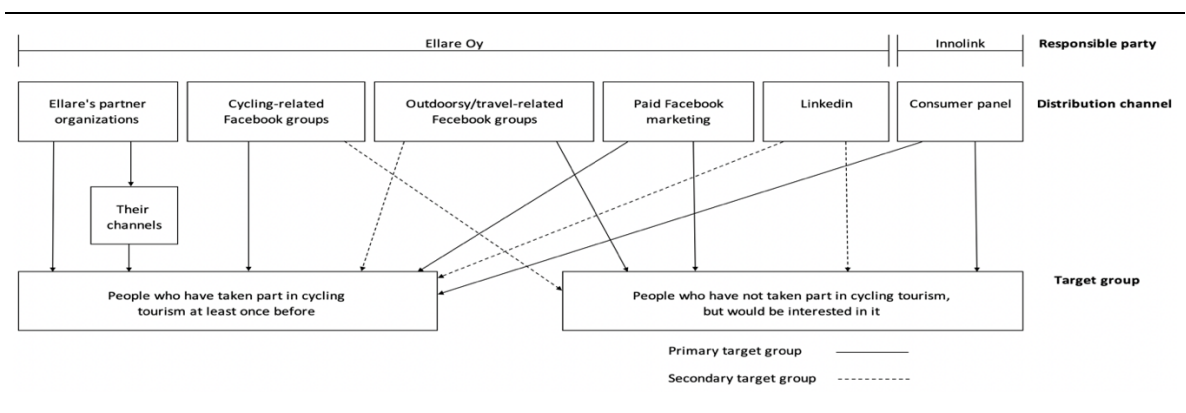
** Plog, 1974 in Fletcher et al. 2018

5.2 Target group and distribution channels

As the main aim of the study was to understand the cycling tourism demand in Finland, the primary target group of the research was Finnish people. Though, internationals living in Finland who speak Finnish and may be found through the same distribution channels were not excluded. To accommodate the needs of the target audience, the online survey was available only in Finnish. The survey questions were translated for the thesis reporting. To determine the current behavior and needs of cycling tourism demand based on the data, the survey was targeted to people who had already taken part in any form of cycling tourism or those who would be interested in it. The questionnaire started with three questions determining if the person belongs to the target group. If the respondent found cycling tourism at least level 2 attractive on a scale of 1 to 5, the full questionnaire opened for them.

Also, as the study aimed to reach the current and potential cycling tourism demand, the differences between these two groups had to be considered when deciding the distribution channels. To be able to reach as broad audience as possible, different distribution ways were used (Figure 5). The survey link was sent to Ellare's partner organizations through email, and they were encouraged to respond to the survey and distribute the link through their networks to be available for their customers. Ellare also shared the link in different groups on Facebook and LinkedIn. Also, a paid marketing campaign was contributed to reaching a wider audience. To ensure a sufficient number of respondents, a part of the data collection was outsourced to an external authority, a research organization, Innolink.

Figure 5: Distribution channels and their target groups



5.3 Data analysis

After the data had been collected through the survey, the data was inserted in Excel for analysis. A univariate data analysis took place, meaning that each variable was analyzed individually. The findings are presented in text and visual form in Chapter 6. In addition to univariate data analysis, descriptive data analysis was to help to answer the research question. As the thesis was done on the side of a more comprehensive study that includes a wide range of different types of cycling tourism, the data to be analyzed in the thesis was to be determined by the following variables:

1. The person must have taken part in cycling tourism previously.
2. The person must have responded to the question ‘What kind of cycling trips have you done previously?’ by choosing at least the point ‘cycling on a longer point-to-point route (e.g. from Helsinki to Turku)’.
3. Among six pictures (Figure 6), the person must have identified themselves with the image closest to a touring cyclist, the photo with black outlines in Figure 6.

Figure 6: Pictures on the questionnaire (Appendix 2)



5.4 Ethical consideration

In each stage of research, from prior to the study to the reporting, many ethical and reliability issues need to be considered (Creswell & Creswell, 2018). In this subchapter, a few factors that were reviewed throughout the thesis process will be pointed out. Also, the action taken to address the possible issues will be discussed.

Quality research results are considered to be unbiased and to credit used sources appropriately (Creswell & Creswell, 2018). Through the process, it was to be made sure that the authorities taking part in the process do not have a vested interest in the research outcome. As the research question was descriptive instead of asking for a relationship between two variables, it was not likely distribution channels to have a vested interest in the outcome. In contrast, many used distribution channels, such as cycling-related organizations, would benefit from reliable data. On the other hand, some of the distribution channels were specialized in a specific type of cycling tourism. To minimize the risk of bias data in terms of receiving significantly more respondents from one type of cycling tourism, a combination of many distribution channels was used. Also, the thesis was to report the findings as they are, with a neutral look on them. To avoid the possibility of misunderstanding, the language used was to be clear and appropriate for the expected audience: tourism students and professionals. Besides, all references were to give credit for their source in APA style.

Concerning the quality of the data, the length of the questionnaire and its insight was to be considered. The survey was relatively long, and there was a risk the quality of responses to decrease though the questionnaire as if the respondents had lost motivation to respond. Therefore, only questions needed in the analysis were asked. The respondents' motivation to respond until the end of the questionnaire was increased by organizing a lottery of three gift cards. Also, the three first questions of the survey were to ensure that only respondents that belonged to the target audience could answer it. The respondents were also asked to provide their contact information if they wished to participate in the lottery. Therefore, the respondents' privacy was to be ensured by storing the data needed to create a research-based segmentation and respondents' contact information separately.

6 Findings

The primary data of the research was collected through a survey, which was open from the 15th of October until the 1st of November 2020. The system did not document the number of times the questionnaire was opened; therefore, the response rate cannot be calculated. Prior to the information analysis, the data was cleaned based on the time spent responding and the quality of responses. Also, if the respondent's answer to the gatekeeper questions indicated the person not to be interested in cycling tourism, they were automatically removed. After excluding the unreliable data, the number of usable responses was 1766, making the sample size of the full study $n=1766$. 944 (53%) responses came through Ellare's distribution channels and 822 (47%) through customer panel conducted by Innolink.

The data to be analyzed in the thesis was to be identified based on three criteria. (1) The thesis was only to examine people who had taken part in cycling tourism before. Therefore, respondents had to indicate that they do cycling holidays at least 'rarer' than once a year. From a total of 1766 respondents, 1259 (71%) had done a cycling holiday at least once before responding to the survey. (2) The respondents must have gone on a cycling holiday where they cycled on a longer point-to-point route, such as from Helsinki to Turku. 599 respondents indicated that they had been on such a holiday, making it 48% of those who had been on any form of cycling holiday that included an overnight stay. (3) Also, among six pictures (Figure 6, Appendix 2), the respondent had to identify themselves with the image closest to bicycle touring. Of all 1766 respondents, 488 (39%) identified themselves with the specific picture. As all three criteria had to apply simultaneously, the final number of responses analyzed in the thesis was limited to a sample size of 235 respondents ($n=235$), this being 13% of the total data.

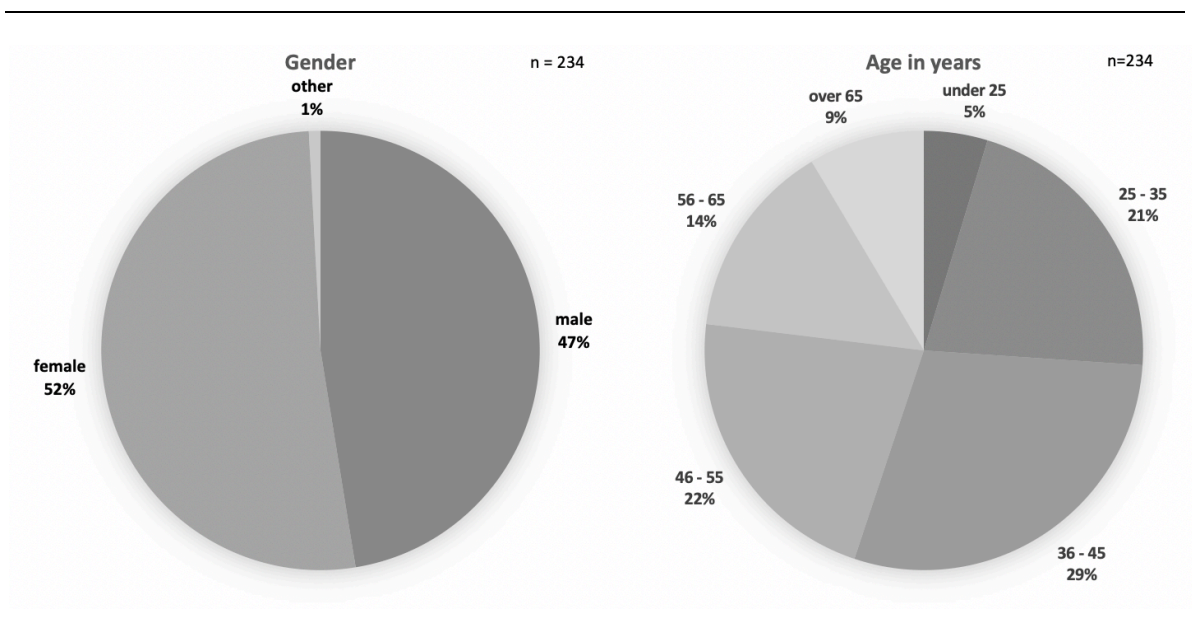
As the aim of the thesis was to create a profile of those taking part in bicycle touring, a frequency analysis of the 17 questions included in the thesis was conducted. As none of the survey questions were mandatory, the respondents could skip them if they wished. Therefore, the number of respondents varies depending on the question. Each variable analyzed within the thesis will indicate the number of respondents for the specific item. In the following subchapters, the results will be presented in two main categories: respondents' background information and cycling tourism.

6.1 Background information

The first nine questions to be discussed in this subchapter focus on the respondents' demographic, geographic, and psychographic information. Respondents' background information will set a basis for the further discussion of what type of people are likely to take part in bicycle touring as well as for the validity of the data.

From a total of 235 respondents, nearly all (99,6%) replied to the questions identifying the respondents' gender and age (Figure 7). In both variables, one respondent left it blank—however, the person not responding varied from the question. A bit over half of the respondents (52%) were female, while 111 respondents (47%) were male. Two people identified their gender as other (1%). The age distribution was rather diverse; the age of respondents ranged from 18 to 75, the average age being 45 years. The largest age groups were 36-45 with 29%, 46-55 with 22%, and 25-35 with 21%. Age group of 56-65 was represented by 14% of the respondents. In addition, 20 (9%) respondents were over 65 and 11 (5%) under 25. Therefore, the data gives rather broad look at the entire population.

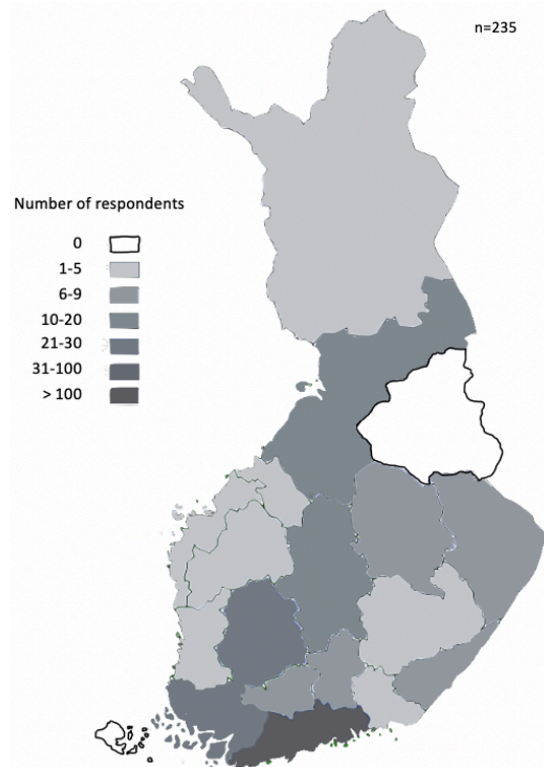
Figure 7: Respondents gender and age in years



The questionnaire was targeted to Finns. However, to generalize the results, the aim was to reach people from all around Finland. There are 19 regions in Finland, wherefrom the only area that did

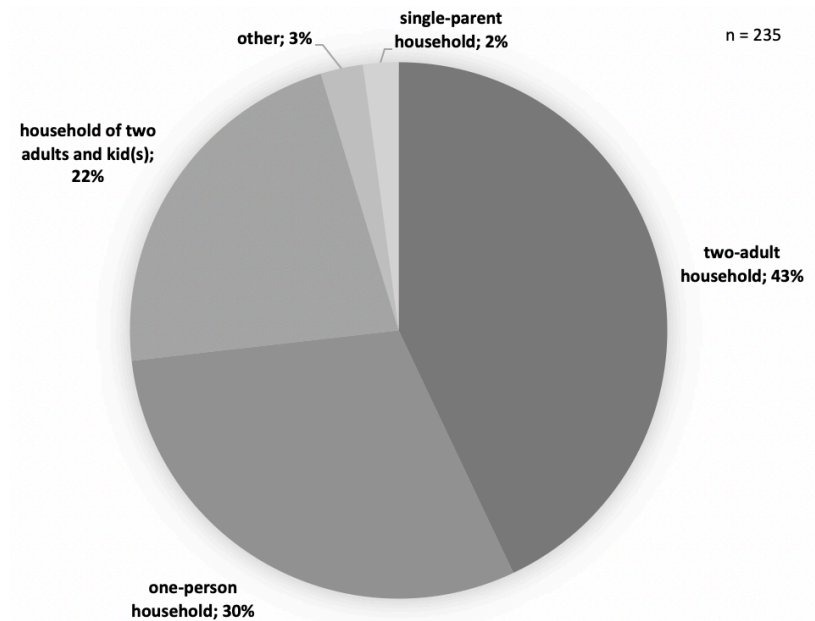
not generate any respondent to the research was Åland Island (Figure 8). This may be due to Åland Island being a Swedish-speaking region. In addition to the questionnaire being available only in Finnish, it can be assumed that regions with a Swedish-speaking majority would have had a better reach through Swedish-speaking distribution channels. Also, the data studied as part of the thesis do not include any respondents from the Kainuu region. All the other areas were represented at least by one respondent. The largest group of respondents (45%) identified their place of residence as Uusimaa, which means that the other 16 regions shared slightly over half (55%) of the respondents. The second-largest groups were residents of Southwest Finland (12%) and Pirkanmaa (11%), followed by Central Finland and Northern Ostrobothnia, with 4% in each region. The other areas were represented by less than 4% of respondents; Päijänne Tavastia (8), South Karelia (7), Tavastia Proper (7), Northern Savonia (7), North Karelia (6), Kymenlaakso (5), Satakunta (5), Southern Ostrobothnia (3), Southern Savonia (3), Lapland (3), Ostrobothnia (2), and Central Ostrobothnia (1). A similar regional division can be seen on the full data. Though on it, the share of Uusimaa is only 30%, giving the other regions a larger share.

Figure 8: Respondents' place of residence



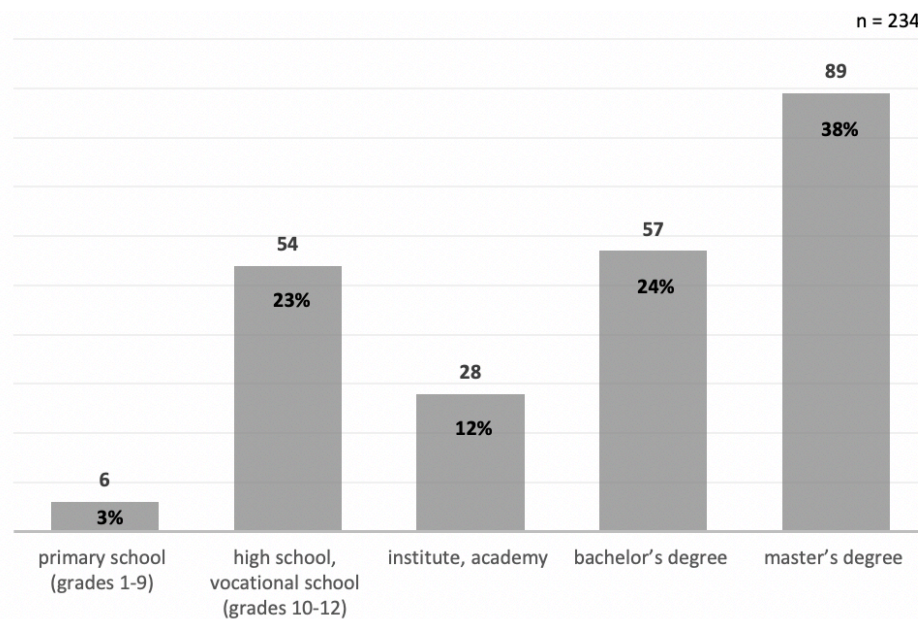
The type of household the respondent is living in at the time indicates the life stage the individual is currently at (Figure 9). 43% of the respondent lived in a two-adult household, being so called double income couples with no kids. The second-largest group was people living alone, with 30%. Simultaneously, one fourth (25%) of the respondents have kids that still live at home.

Figure 9: Respondents' type of household



Concerning respondents' education level (Figure 10), the largest group (62%) of respondents held a master's degree (38%) or a bachelor's degree (24%), closely followed by high school or vocational school graduates with 23%. This represents a higher educational level than the typical academic structure in Finland, according to which only 11,7% of the population over age 15 hold a bachelor's degree and 10,8% hold a master's degree or higher (SVT, 2019; SVT, n.d.) The skewness of the results may be caused by a high number of respondents living in Uusimaa, close to the many higher education institutions of the Helsinki metropolitan area. As the full data (n=1766) shows a bit lower but still education level above average, with 51% of participants holding a bachelor's or master's degree, it may indicate that highly educated people are more likely to participate cycling tourism.

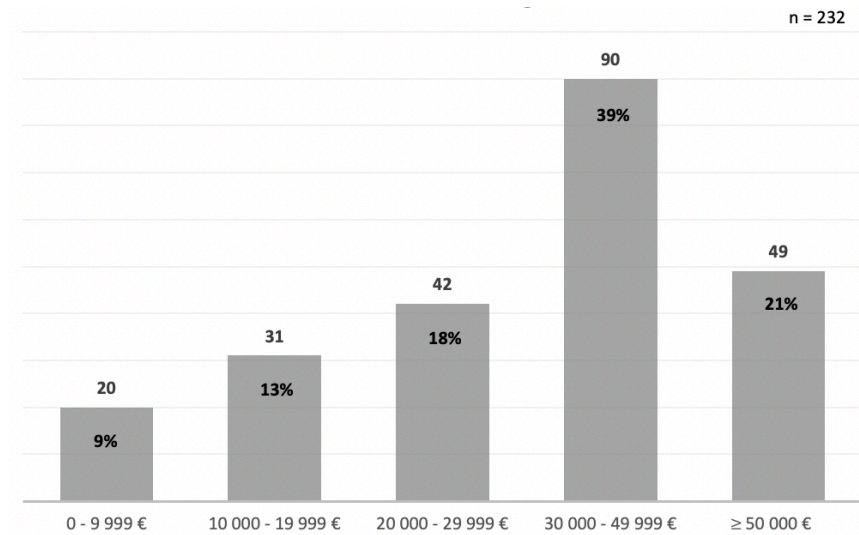
Figure 10: Responders' level of education



The research data represents higher income as the regular income distribution in Finland (Figure 11). Three fifths (60%) of the respondents' annual gross income was over 30 000 euros, which is significantly overrepresented income group when compared to the overall population (39,9%) (Statistics Finland, 2020). In contrast, the lower income groups, people who earn less than 20 000 euros in a year, were underrepresented with 22%, while 40,5% of all Finns belong to that income group (Statistics Finland, 2020). However, the income group between these, namely 20 000-29 000, represents the usual income distribution in Finland in some extent, being only slightly underrepresented. 18% of the respondents belong to this income group, while 19,7% of overall population does (Statistics Finland, 2020). The higher income rate may be related to the higher education level, though higher education does not automatically generate higher income. Also, as Maslow's hierarchy of needs indicate, people are likely to fulfil their basic needs, before they wish to reach to the higher levels (Maslow, 1970, as cited in Fletcher et al., 2018). Tourism is not part of humans' basic needs; therefore, it may not have a high priority among people with lower income,

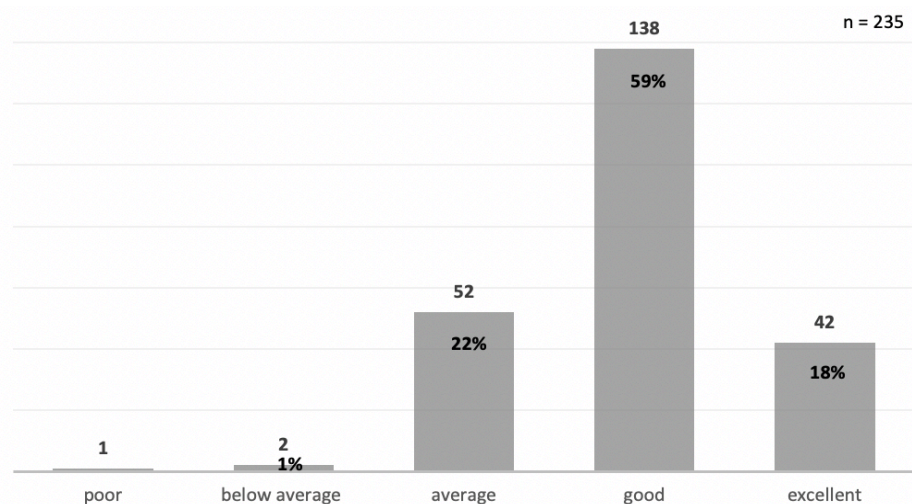
especially during a health crisis that generates a large number of lost jobs among low-income service occupations.

Figure 11: Respondents' annual gross income



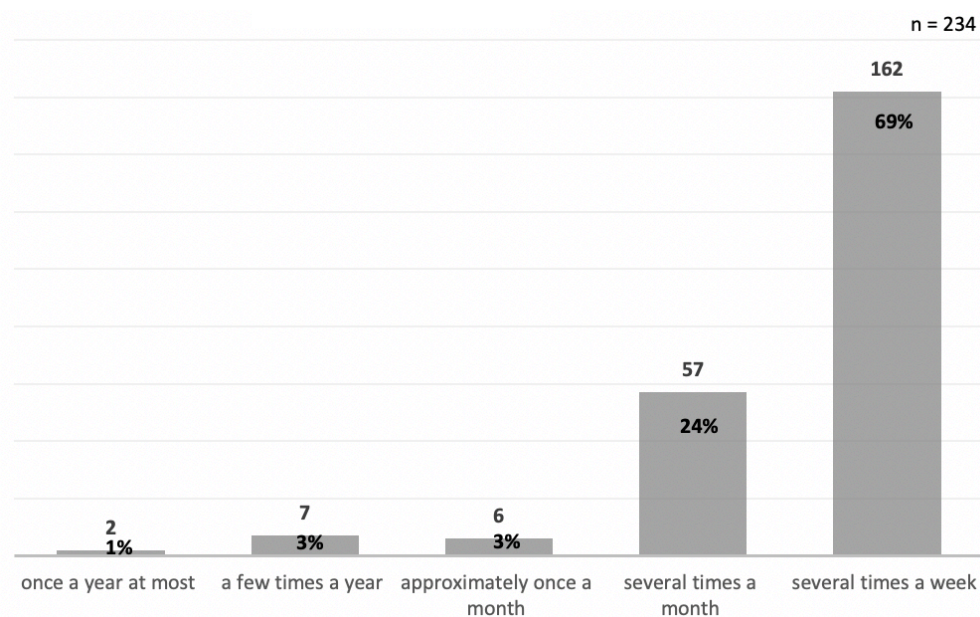
Based on the data, 77% of the respondents identify their current physical health as good or excellent (Figure 12). The data analyzed in the thesis (n=232) demonstrate higher experienced physical health than overall respondent (n=1766).

Figure 12: Respondents' physical health



The respondents were to identify how often they use a bicycle in their free time, including the rides they might cycle to and from work (Figure 13). This indicates the respondents' general cycling frequency but does not inform the purposes these people cycle. They might use it as a way of transportation from place A to B, such as between home and work or home and grocery store, or they might as well cycle for fitness or tourism purposes. The majority (69%) of the respondents answered that they cycle several times a week, while one fourth (24%) cycle several times a month. Only 1% of the respondents cycle once a year at most.

Figure 13: Respondents' general cycling frequency

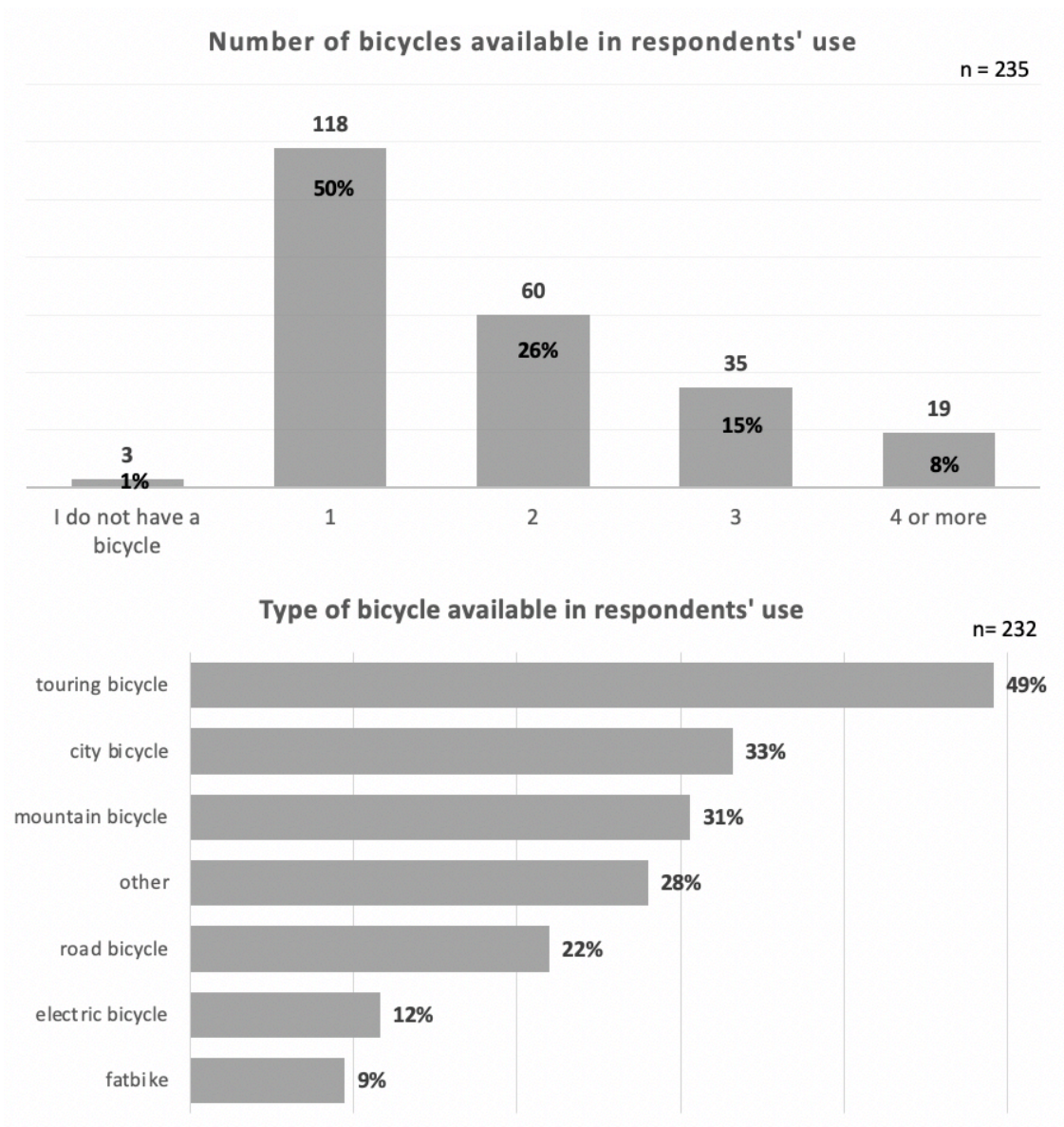


Generally, the respondents tend to not only have an active lifestyle as they cycle several times a week, at least during the times when the weather allows it, but 49% of the respondents have more than one type of bicycle in their use (Figure 14). As many as 8% of the respondents have four or more different bicycles available. The other half (50%) of the respondents have one type of bicycle, while only 1% do not have a bicycle.

The most popular type of bicycle among the respondents was a touring bicycle; 49% of all who had a bicycle available in use having one. The second most popular type was a city bicycle (33%), followed by a mountain bicycle (31%). One-fifths (22%) had a road bicycle, while the minority had an

electric bicycle (12%) or a fatbike (9%) available in their use. In addition to the already named bicycle types, 28% of the respondents had other kinds of bicycles, most commonly hybrid (23) or cyclocross (10).

Figure 14: Bicycles available in respondents' use

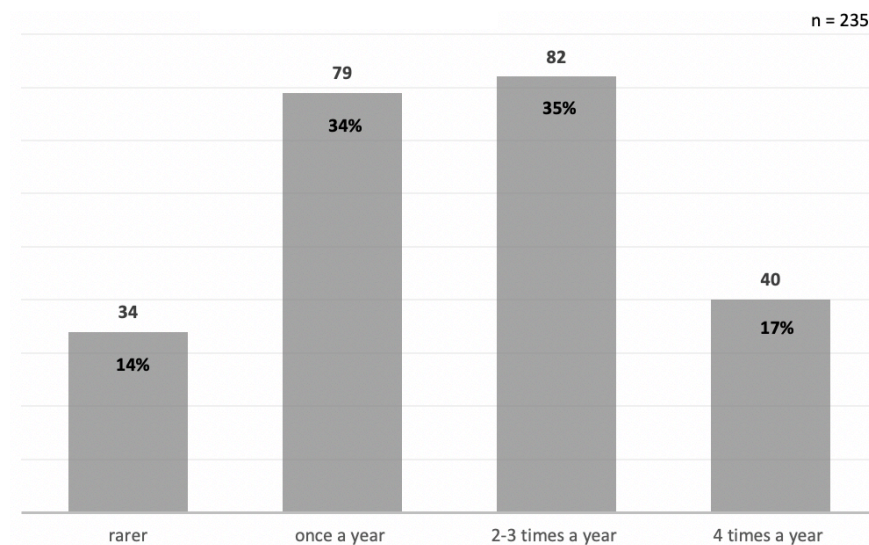


6.2 Cycling tourism

In this subchapter, the respondents' behavioral characteristics during cycling holidays will be considered. The variables asked from the respondents were a mixture of items under both subcategories, product usage and product benefit.

When looking at the frequency of cycling holidays (Figure 15), over half (52%) of the respondents make a cycling holiday with a minimum of one night away from home at least twice a year, while one third (34%) takes a trip once a year. The minority (14%) of the respondents identified their frequency of cycling holidays to be less than once a year. As the data to be analyzed in the thesis was limited to those who had been on a cycling holiday at least once before responding to the questionnaire, the option of not having experienced a cycling holiday with an overnight stay has been excluded from the figure.

Figure 15: Respondents' frequency of cycling holidays including an overnight stay

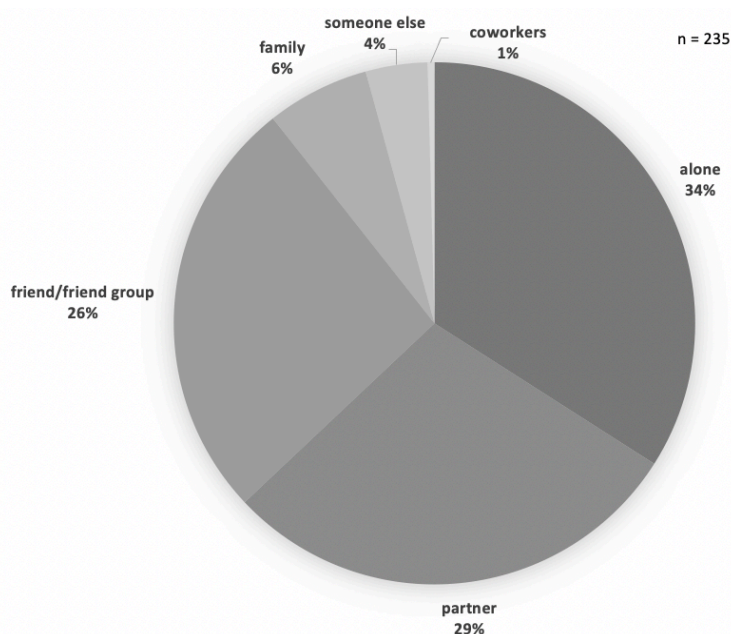


The insight of a holiday varies enormously depending on with whom one travels; when traveling alone, one needs to consider their needs and desires only; while traveling with a kid, the adult has all responsibility to make sure everything runs well. A third (34%) of the respondent identified that their cycling holidays are mainly solo trips, meaning that they travel alone (Figure 16). The second

largest group (29%) of respondents travel with their partner, closely followed by those who travel with friends (26%). Only 6% of the respondents identified family to be their most common travel companion on cycling holidays. The division is reasonably similar to the division on the type of household. When 43% of the respondents live alone, they may as well do cycling holidays by themselves, while 30% live in a two-adult household, their most likely travel companion could be their partner. However, as each variable is examined individually, such statements are speculation only.

The respondents were also asked to indicate on a scale of 1-5 if they were closer to a statement of 'I travel alone' or 'I prefer traveling in a travel party of at least 6 people'. Though the question is somewhat similar to the previous one, only 20% of the respondents stated they travel alone. The skewness may be due to the different question formation; the first question indicated the most common travel companion, while the second one is more preference focused. The results suggest that even though one travels alone, they might wish to have a travel companion. Also, the most popular response was the second closest option to 'I travel alone', with 43%. The response indicates that the preferred travel party size is 2-3 people, aligning with one's partner being a relatively common travel companion. Only 3% of the respondents indicated that they prefer a travel party of at least 6 people.

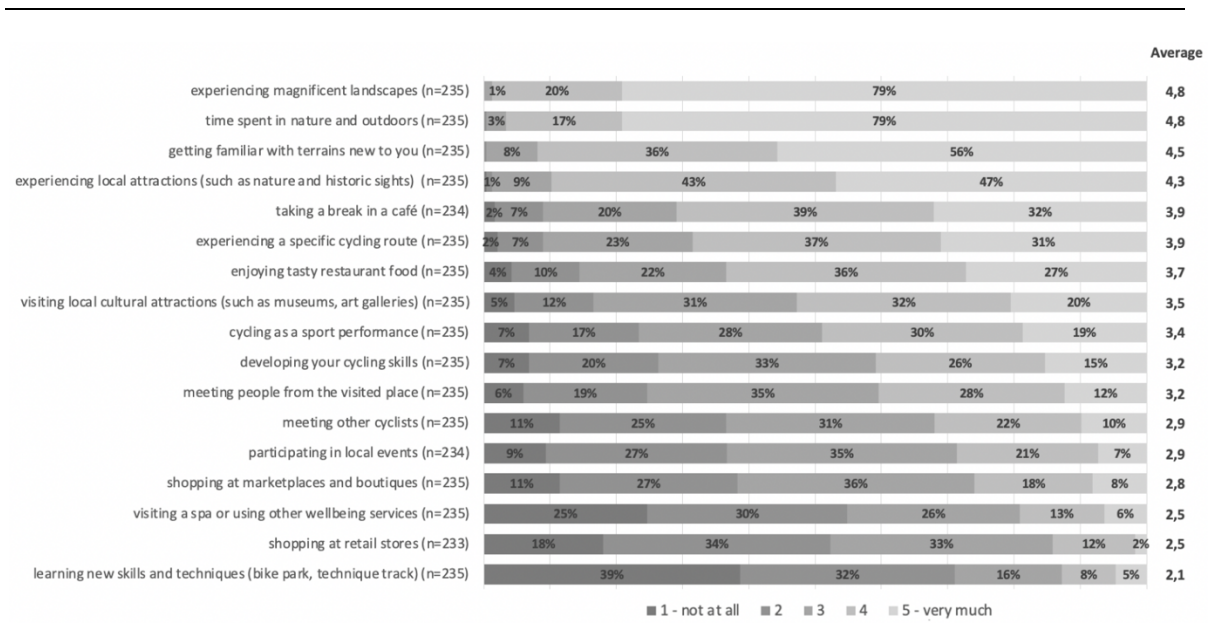
Figure 16: Respondents most common travel companion



Concerning variables that people find to generate pleasure during their cycling holiday, the respondents were asked the general importance of 17 variables (Figure 17). These responses also indicate what the respondents would wish to do and see while on a cycling holiday. The higher the average score, the more the variable is thought to generate pleasure among all respondents. At the same time, the distribution of the importance level within a variable have been indicated in percentages. Based on the data, it is apparent that experiencing magnificent landscapes (79%) and time spent in nature and outdoors (79%) were essential variables for most. Further important factors were a desire to get familiar with terrains new to the person (56%) and experiencing local attractions such as nature and historic sights (47%). The research findings are similar to a study conducted by Rodríguez (2019). He states that the region’s attractiveness regarding nature, landscapes, cycle routes, accommodation, and restaurants are important influencing factors for the cycling tourism demand.

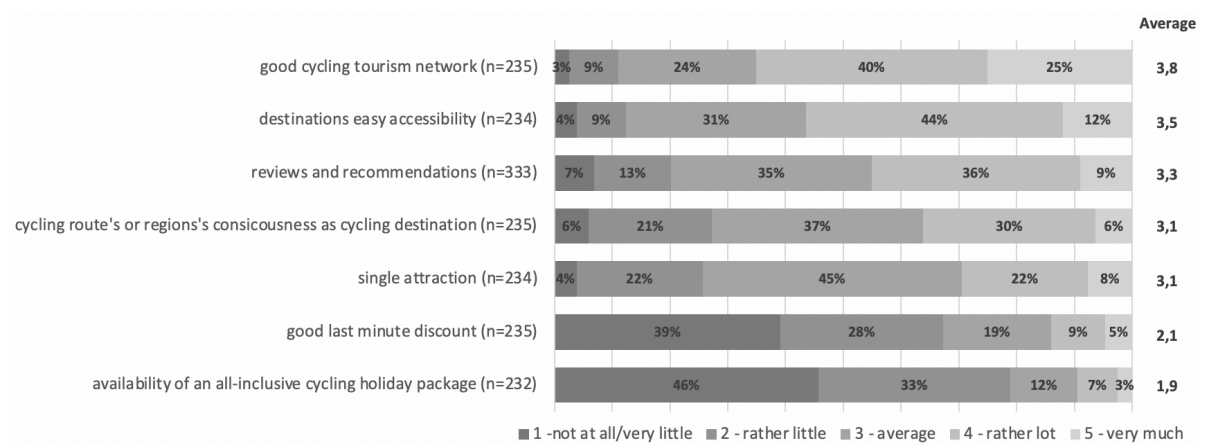
On the other hand, the variables the respondents assessed not to generate any pleasure were to learn new skills and techniques (39%) and visiting a spa or other wellbeing services (25%), followed by shopping at retail stores (18%). However, as shown in Figure 16, the alteration of opinions within variables is substantial; when one thinks something generates significant pleasure, it may be insignificant for someone else.

Figure 17: Variable that generate pleasure for the respondents



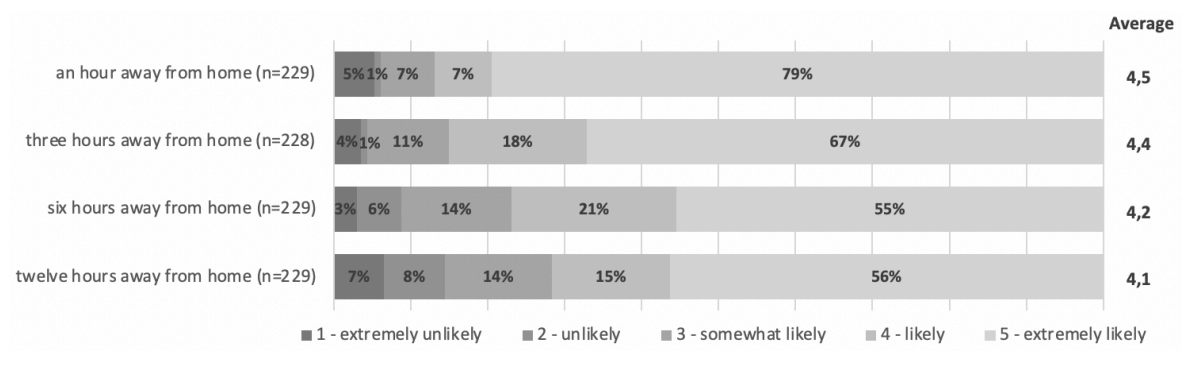
The respondents were also asked how much seven factors impact their destination choice (Figure 18). Over half of the respondents found a good cycling network (65%) and destinations easy accessibility (56%) to impact their destination choice rather lot or very much. Also, 45% of the respondents' destination choice was influenced rather lot or very much by reviews and recommendations. In addition, destinations consciousness as a cycling destination (36%) and single attraction (30%) were found relatively important. In comparison, the availability of an all-inclusive cycling holiday package (40%) or good last-minute discount (37%) was found not to impact or impact very little their destination choice.

Figure 18: Variables impacting the respondent's destination choice



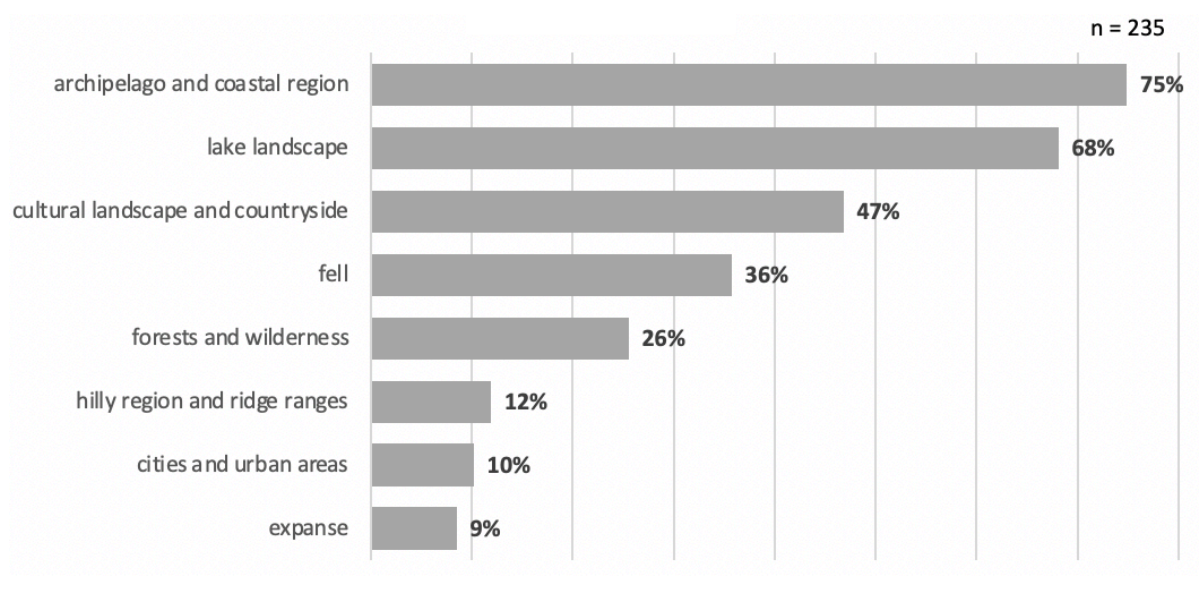
The study also found that cycling destination an hour away from home was the most likely distance by 79% of the respondents stating that it would be extremely likely for them to attend on a cycle trip within an hour away from home (Figure 19). The longer distance, the fewer respondents found it extremely likely. An interesting finding was that respondents, on average, were more likely to make a cycling holiday six hours away from home than twelve hours away from home. Still, more people were extremely likely to make a cycling holiday twelve hours away from home (56%) than six hours away from home (55%).

Figure 19: Destinations' likely distance from respondent's home



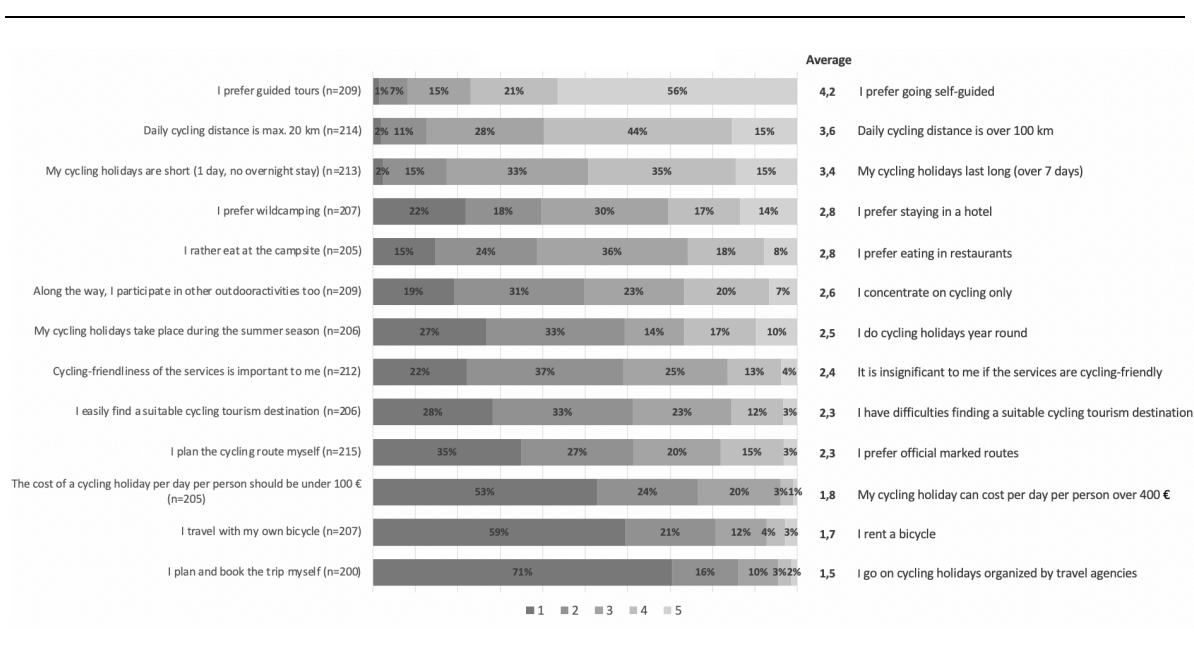
When looking at the respondents' preferred cycling landscape (Figure 20), it is apparent that the archipelago and coastal region (75%) and lake landscape (68%) belong to the three most attractive landscapes for a significant majority. These are followed by cultural landscape and countryside (47%) and fell region (36%). Also, a quarter (26%) of respondents preferred forests and wilderness. The minority found hilly and ridge regions (12%), cities and urban areas (10%), and expanse (9%) to belong to the three most attractive landscapes.

Figure 20: Preferred cycling landscape by the respondents



Another critical factor to consider is respondents' behavioral characteristics while on cycling holiday (Figure 21). The respondents were asked to identify themselves closer to two extreme ends, depending on which one described themselves better as cyclists. The data shows that 56% of the respondents wish to go self-guided rather than on a guided tour. As respondents were asked to identify their daily cycling distance between a maximum of 20 km and over 100, option 3 (28%) and 4 (44%) were chosen by 72%. The exact cycling distances cannot be defined based on the data. However, option 3 is likely to vary around 60 km, while option 4 range somewhere around 80 km. This indicates the cycling distance among the respondents to be more than Rodríguez (2019) found in his study (40-60 km) but somewhat similar with the average daily distance of 64-96 km stated by Alff (n.d.). The same options 3 (33%) and 4 (35%) were the most popular responses when asked the length of the holiday on a scale of day trips and holidays lasting over seven days. The data indicates a bit shorter cycling holidays when compared to the average trip length of 5-7 days found by Rodríguez (2019).

Figure 21: Respondents' behavioral characteristics



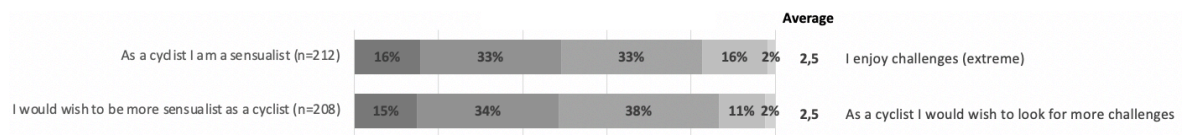
The positioning of respondents' behavioral characteristics towards hospitality services, including accommodation and restaurant, was somewhat midrange, with an average of 2,8. This indicates that the respondents do not prefer wild camping nor hotel, but something between, same with

eating at the campsite and restaurant. Also, the cycling-friendliness of the services was found significant by rather many (22%), while most indicated it to play at least some kind of role. Besides cycling, 19% said to participate in other outdoor activities too, while only 7% said to concentrate on cycling only. The data indicate that even though cycling plays a major role on holiday, for 93% of the respondents, it is not the only focus of the trip. A quarter (27%) of the respondents indicated their cycling holidays taking place during the summer season, while 10% make cycling holidays year-round. The average score was 2,5, indicating that the respondents are likely to lengthen the cycling tourism season by starting earlier in the spring and cycling longer to the fall but taking a break from it during the season when factors such as the weather make it more difficult.

The data shows that most (61%) find a suitable cycling destination relatively easily. 71% of the respondents plan and book their trip themselves, and 35% also plan the cycling route themselves rather than using officially marked routes. Almost three fourths (59%) travel with their own bicycle, while only 3% rent a bicycle. The rest, 38% in-between the extreme ends, betoken that the respondent may sometimes rent a bike, probably depending on the destination's distance from home or the type of cycling holiday. This indicates a rather high potential for renting a bicycle among the total number of respondents (n=235), where 99% have a bicycle in their use, wherefrom 49% have two or more different types of bicycles. When the respondents were asked how much a cycling holiday could cost per day per person when taking all costs into account, including expenses such as equipment rentals, guide services, accommodation, meals, and transportation, according to 59% of the respondents, the cost should be under 100 euros, while 1% would pay over 400 euros.

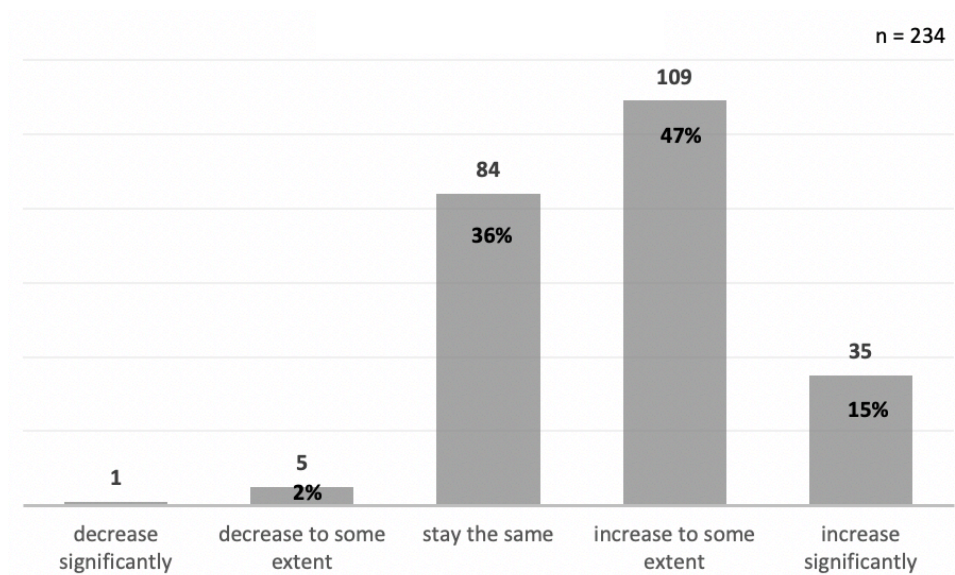
Concerning the behavioral characteristics, the respondents were asked to identify their cycling personality (Figure 22). 49% of the respondents identified themselves to be closer to sensualist than someone looking for challenges. On the other hand, 18% positioned themselves closer to the 'I enjoy challenges' option. When asked for what they wish they were, 38% of the respondents choose the middle option, indicating that they are close to the type of cyclist they wish they were. 49% would want to be more sensualist as they are, while 13% identified their wish to look for challenges.

Figure 22: Respondents' cycling personality



The data shows that 6% of the respondents experienced the current amount of cycling holidays to be sufficient. The largest group of respondents (44%) wished to have cycling holidays more often, while the other half (50%) positioned themselves in between the two statements. A wish by itself does not indicate a realistic development on the activity; one may wish to do it more often but might be limited by factors such as health condition, time, or money. Therefore, the respondents were also asked to identify how they would think their frequency of cycling holidays would develop in the next year (Figure 23). 62% of the respondents indicated that their cycling holiday activity would increase at least to some extent, while only 2% positioned their activity to decrease. The rest, 36%, identified their activity as a cycling tourist to stay the same. Therefore, the data indicates a high growth potential for cycling tourism among the studied group of people.

Figure 23: Respondents' future frequency of cycling holidays



7 Conclusion

In this chapter, the findings presented in Chapter 6 are analyzed and processed to answer the research question. Also, the validity and reliability of the data are evaluated. Lastly, the author of the thesis introduces a few possible future research topics based on the limitations of the study.

7.1 General discussion

The purpose of the comprehensive research was to create study-based segmentation of the cycling tourism demand in Finland, while the thesis research was to focus on bicycle touring demand only. The aim of the thesis was to describe the current bicycle touring market by answering the following research question: *What type of people are most likely to take part in bicycle touring tourism?* In this chapter, the research question is to be answered.

Study-based segmentation is divided into four categories depending on the type of information used in creating it. Segmentation can be focused on the demographic, geographic, psychographic, or behavioral characteristics of the group studied (Kotler & Armstrong, 2012). Behavioral segmentation is seen to be the most accurate way of segmentation, though the most expensive too (Gunter & Furnham, 1992; Weinstein, 1994). To create as accurate segmentation as possible, the respondents were asked to identify their personal characteristics in each variable group.

When looking at the likely demographic profile of touring cyclists, the results of the primary research indicate that participation in bicycle touring is not gender nor age-related. The data also shows that highly educated people would be more likely to be interested in this form of tourism. Possibly in correlation with the high education level, the respondents were more likely to indicate an above-average gross income. They were also more likely to live in a two-adult household or alone, which indicates that bicycle touring is likely to be more attractive to these who do not have children. Based on the age division and the type of household, the most likely touring cyclist profile include people in different stages of life such as (1) those who by their relatively young age may be focusing on their studies or to become economically independent, (2) those who might plan new

addition to their family in the upcoming years (3) or for different reasons will not have children, as well as (4) those whose children have moved out already. However, as one-fourth of the respondents indicated that they live with children, it cannot be concluded that bicycle touring would not be attractive for them.

The nationality is likely to be Finnish; however, the respondents' nationality cannot be stated from the research data. In fact, as the respondents were only given a choice to pick places of residence inside Finland, this may have caused exclusion of some Finns that live abroad. On the other hand, the data may include international people who know Finnish and live in Finland. In this study, nationality is an insignificant variable; however, the geographic location within Finland is essential. The questionnaire reached the widest audience in the region of Uusimaa (30%). Therefore, the data-based-segmentation will be the most accurate to describe cycling tourists from this region. As an only region that was not represented, the data do not tell anything about the demand in Åland Island. When comparing the data left after limiting it by the three criteria for the thesis research (n=235) to the place of residence division on the full data (n=1766), the results suggest that there is a large demand for bicycle touring in Uusimaa.

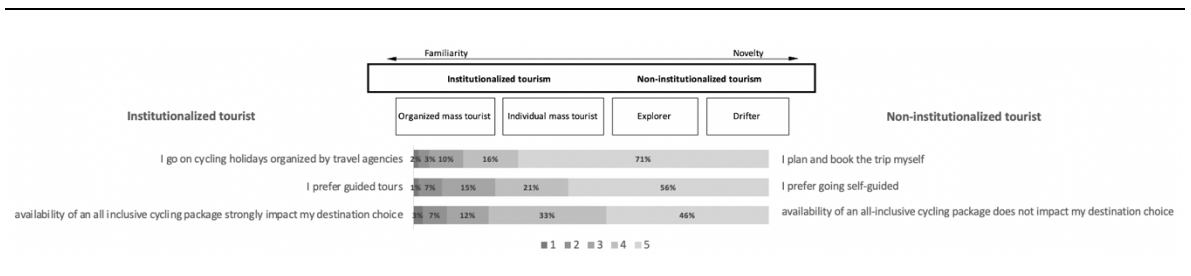
When describing the psychographic characteristics of those likely to participate in bicycle touring, it is to be pointed out that there is no clear definition of variables constituted as psychographic (Weinstein, 1994). However, psychographic segmentation research generally examines people's values and lifestyle (Gunter & Furnham, 1992). The psychographic information studied in the research focused on lifestyle variables that could be related to the respondents' participation in cycling tourism. As previously introduced, age division and the type of household may indicate the respondents representing many different stages of life. However, these same variables may hint towards the lifestyle the demand may have, as broadly as people who do not have children may focus on their own needs and desires rather than making compromises for another human life they are responsible for. Therefore, it may be assumed that the most likely type of person taking part in bicycle touring is likely to make general decisions as well as travel decisions, mainly based on their own needs and desires.

The relatively high cycling activity and participation in tourism with a physical involvement suggest that those most likely to take part in bicycle touring have an active lifestyle in general. Based on the

data, these people have higher average physical health level than the general population interested in cycling tourism. As they are active cyclists in general, they are extremely likely to own a bicycle. Besides that, the high percentage of the respondents having more than one bicycle indicates a high involvement in cycling. Owning multiple different types of bicycles also suggests that they have a somewhat materialistic lifestyle, which indicates the people to be a likely demand also for the cycling equipment market.

Based on the respondents' travel behavioral characteristics, an assumption of the tourist type of those most likely to participate in bicycle touring will be made. Based on Cohen's characterization, tourists can be divided into institutionalized and non-institutionalized tourists, depending on their preference for using tour operators and travel agencies' services (Cooper et al., 2005). The results of the research data analysis indicate a higher likeliness of touring cyclists to be non-institutionalized (Figure 24). This assumption is made based on three findings: (1) 71% of the respondents plan and book their trip themselves, rather than use a travel agency, (2) 56% identified preferring to go by themselves instead of on guided tours, and (3) 79% of the respondents indicated availability of an all-inclusive cycling package to impact their destination choice rather little or less.

Figure 24: Touring cyclist integrated in Cohen's theory, Part 1

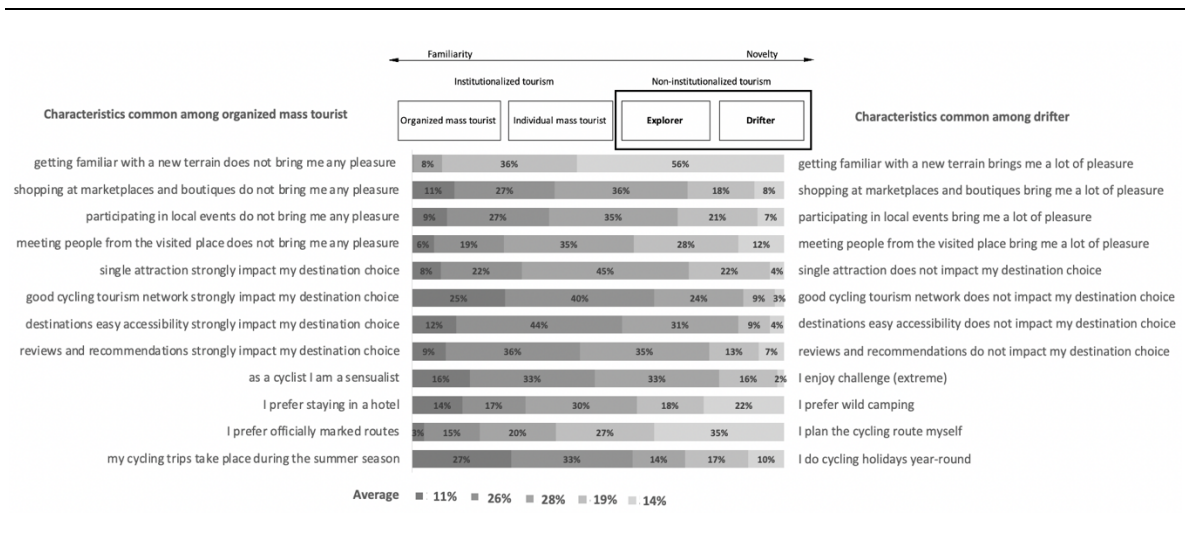


In his theory, Cohen divides non-institutionalized tourists again into two groups, explorer and drifter (Chapter 4). The main difference between these two is that an explorer values a certain security and comfort level while a drifter wishes to immerse themselves in the culture (Cooper et al., 2005). Figure 25 presents thirteen variables, in which the respondents' preference in factors such as novelty, cultural aspect, easiness, and accommodation is shown. The data shows that, even though novelty in terms of the visited terrain is a valued factor, the cultural aspects through marketplaces and boutiques, local events, and meeting local people generate relatively low pleasure. Concerning easiness, a good cycling network and easy accessibility are prioritized to some extent.

When asked about the level of impact a single attraction has on one's destination choice and preference of a hotel opposite wild camping, the respondents indicated themselves to be in the mid-range. Also, respondents were more likely to identify themselves as sensualist than someone looking for a challenge.

When looking at the average share of each option in all the thirteen variables combined, the data shows that, on average, the largest share of participants position themselves to the most middle option between the two statements. The data indicates that though those who are the most likely to participate in bicycle touring are non-institutionalized and find novelty through the terrain rather important, they tend to value a certain level of comfortability. Therefore, based on the data, it can be assumed that the most likely tourist type to participate in bicycle touring is an explorer.

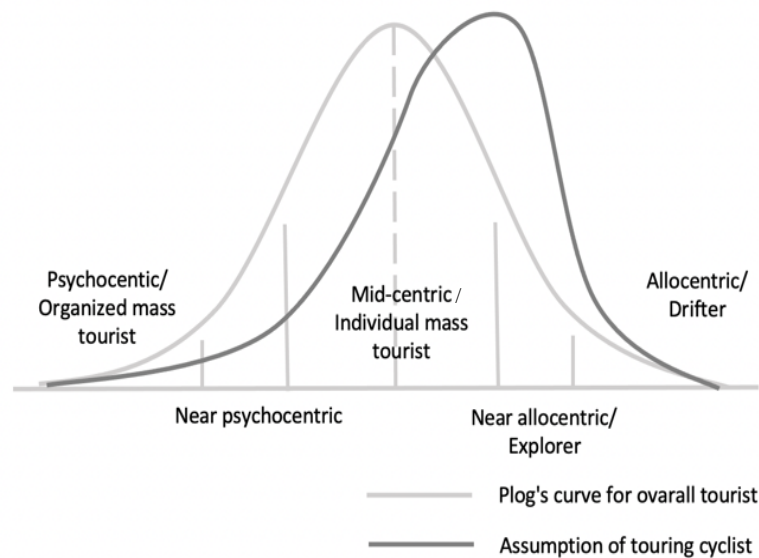
Figure 25: Touring cyclist integrated in Cohen's theory, Part 2



It is also important to point out that while explorer would be the most likely type of tourist to attend bicycle touring, the data shows significant alteration within each variable. Plog argues most people to be mid-centric (Cooper et al., 2005), which equals to the individual mass tourist in Cohen's theory (Vuoristo, 2003), and the rest to be psychocentric and allocentric evenly in both sides of the group of mid-centric (Figure 26). However, the data suggest the bicycle touring demand in Finland not to follow this evenly distributed curve created by Plog. As previously concluded, touring cyclist is more likely to be non-institutionalized; therefore, the data suggest the bicycle touring demand to be focused more on the allocentric side, though not growing the number of extreme allocentric

significantly. The skewness is likely to be caused by different focus groups on the two studies. Plog aimed to create a structure that could be applied to all tourism, while this research focused on the existing bicycle touring market, which currently is not mainstream tourism.

Figure 26: Touring cyclist integrated in Plog's theory



By identifying common characteristics among touring cyclists, the thesis provides a new perspective of a specific customer group within cycling tourism. The findings allow tourism industrial players to compare their current products, services, and marketing efforts to a research-based analysis. Based on the data, enterprises can modify their offerings and create new customer-oriented products. The data suggest there to be a significant alteration within the touring cycling segment; therefore, there is a demand for different types of products and services. Each individual industrial player is to consider and adjust the research finding for their strategical benefit. The research also provides information, such as a suggestion of a high demand region, that could be utilized when planning for marketing activities for domestic tourism in Finland. Therefore, the thesis provides the industry a framework on how to align its strategies to better meet the customers' needs, which can contribute to the development of cycling tourisms in the studied regions.

7.2 Reliability and validity

Reliability and validity are common tools to evaluate the quality of a study. Reliability refers to the repeatability of the study (Creswell & Creswell, 2018). Though survey-based research is unlikely to provide the exact same results when repeated (McLeod, 2013), especially when conducted at another time or in another society (Heikkilä, 2014), a strong correlation between the results indicates reliability (McLeod, 2013). The research data indicate similar findings as international demand studies conducted previously, which suggest the research to be repeatable and, therefore, reliable. However, it is to be noted that due to Covid-19, customer behavioral characteristics are at a turning point (Zambito, 2020), which means that it is unknown how people will adapt to the changing environment. The current health crisis may also cause a large temporal growth in cycling tourism and domestic tourism demand in general, while after the situation has gone back to 'normal,' the behavior may rebound. Therefore, the data may indicate a more significant market than it is.

On the other hand, the concept of validity discusses the generalizability of the data, which may be divided into internal and external validity. Internal validity refers to the accuracy of the data within the studied group of people. (Patino & Ferreira, 2018) The hypothesis that touring cyclists are most likely non-institutionalized and can be categorized as 'explorer' in Cohen's categorization is based on the results of the data analysis. Also, the assumption of Cohen's distribution of psychocentric-allocentric tourists being emphasized towards allocentric is based on the distribution of the data whose mean tends towards the right side. In addition, due to the factors that the majority of respondents answered until the end of the questionnaire, took their time on responding, and proved insightful responses also in the open-ended questions, the primary data presents high quality. Besides that, only approximately 1% of the respondents' answers were discarded due to low quality issues. Though the open-ended questions are not included in the thesis, their quality was a key factor when creating the data filters. Therefore, it can be stated that the results express an internal validity.

However, some of the research data should be approached critically; for example, the experienced level of physical health. Meltzer and Hochstim (1970) argue that the health level indicated in survey responses may not correlate with the actual health level, which means that individuals may tell being fitter than they actually are. With cycling tourism, people may have a conceit of it to be only

for people whose health is above average or who cycle on a daily basis. This may have caused respondents not to provide accurate information. Also, each respondent had their individual criteria to adjust the level of their physical health. These criteria may have significant alteration between the individuals. Therefore, it can be concluded that some of the questions provide just a hint toward the whole truth. However, these questions have an insignificant impact on the hypotheses' validity.

When judging the external validity of a research, the applicability of the results in similar people in different settings is evaluated (Patino & Ferreira, 2018). The largest amount of respondents (30%) from the region Uusimaa indicates that the data represent the highest external validity within this region. However, external validity can be proven only if a tourism industrial player would create a cycling product or marketing efforts align with the data analysis results.

7.3 Limitations of the study and future research

Even though the research generates additional information about the bicycle touring demand in Finland, the descriptive analysis taking place in the thesis is based on univariate data analysis. Therefore, the assumptions have limited accuracy. Multivariate data analysis is to be conducted on the primary data collected in the research process. Unlike univariate analysis, multivariate analysis will allow to find out interdependencies and correlation between different variables. However, the further processed data is classified confidential.

Besides, it is recommended to carry out this study annually, since it would allow the development and changes in the demand to be analyzed. Therefore, it provides a future research opportunity, especially for the commissioning party of the thesis, Ellare Oy. Furthermore, as the research focused on domestic tourism only, both inbound and outbound cycling tourism demands would provide possible research topics in the future.

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CYCLING TOURISM SURVEY RESEARCH PYÖRÄMATKAILUN KYSELYTUTKIMUS

TAUSTATIEDOT

BACKGROUND INFORMATION

1. Gender

Sukupuoli

- female nainen
- male mies
- other muu

2. Year of birth

Minä vuonna olet syntynyt

- a drop-down menu including 2003 or earlier, 2002-1938
pudotusvalikko vaihtoehdoilla 2003 tai aiemmin, 2002-1938

3. Place of residence

Asuinalueesi

Region Maakunta

- a drop-down menu including all regions in Finland
pudotusvalikko Suomen maakunnista

Town Kunta

- a drop-down menu including all towns in the region chosen in the previous bar
pudotusvalikko yllävalitun maakunnan kunnista

4. Type of household

Kotitalouden muoto

- one-person household asun yksin
- two-adult household kahden aikuisen talous
- single-parent household yksinhuoltajakotitalous
- household of two adults and kid(s) kahden aikuisen ja lasten talous
- other muu

5. What is your highest completed education level?

Mikä on korkein suorittamasi koulutustaso?

- primary school (grades 1-9) peruskoulu
- high school, vocational school (grades 10-12)
lukio, ylioppilas- tai ammatillinen tutkinto
- institute, academy opistotutkinto
- bachelor's degree alempi korkeakoulututkinto
- master's degree ylempi korkeakoulututkinto

6. What is your gross annual income?

Mitkä ovat henkilökohtaiset vuositulosi ennen veroja?

- 0 – 9 999 €
- 10 000 – 19 999 €
- 20 000 – 29 999 €
- 30 000 – 49 999 €
- 50 000 € –

7. How would you describe your current physical health?

Miten kuvailisit omaa fyysistä terveydentilaasi?

- poor huono
- below average välttävä
- average keskitaso
- good hyvä
- excellent erinomainen

8. How often do you cycle in average on your free time, including the way to work?

Consider only the time period when, for example, weather conditions allow cycling.

Kuinka usein pyöräilet keskimäärin vapaa-ajalla mukaan lukien työmatkat?

Arvioi vain niiden ajanjaksojen osalta, jolloin esim. sää mahdollistaa pyöräilyn.

- once a year at most enintään kerran vuodessa
- a few times a year joitakin kertoja vuodessa
- approximately once a month noin kerran kuukaudessa
- several times a month useita kertoja kuukaudessa
- several times a week useita kertoja viikossa

9. What kind of bicycle do you have currently available for your use?

Millainen polkupyörä/-iä sinulla on tällä hetkellä käytössäsi?

Select all valid options. Valitse kaikki paikkansapitävät vaihtoehdot.

- city bicycle kaupunkipyörä
- mountain bicycle maastopyörä
- fatbike läskipyörä (Fatbike)
- road bicycle maantiepyörä
- touring bicycle retkipyörä
- electric bicycle sähköpyörä
- other, specify muu, mikä?
- I don't know en tiedä
- I do not have a bicycle available for my use
minulla ei ole pyörää käytössä

CYCLING TOURISM
PYÖRÄMATKAILU

10. How often do you go on a cycling holiday that includes at least one night away from home? Kuinka usein käyt yöpymisen/-iä sisältävällä pyörämatkalla?

- 4 times a year 4 kertaa vuodessa
- 2-3 times a year 2-3 kertaa vuodessa
- once a year kerran vuodessa
- rarer harvemmin
- I have not done a cycling holiday yet en ole vielä käynyt pyörämatkalla

11. With whom do you most commonly participate in activities considered as cycling tourism? Millaisessa seurueessa olet yleisimmin ollut pyörämatkalla?

- alone yksin
- partner puolison
- family perheen
- a friend/friend group kaverin/kaveriporukan
- coworkers työporukan
- someone else jonkun muun

12. Estimate how much the following variables generates pleasure during your cycling holidays? Arvioi kuinka paljon seuraavat asiat tuottavat sinulle nautintoa pyörämatkallasi?

On a scale 1 to 5 asteikolla 1 – 5:

1 = not at all ei lainkaan...5 = very much erittäin paljon

- experiencing local attractions (such as nature and historic sights)
paikallisten nähtävyyksien kokeminen (kuten luonto- ja historialliset kohteet)
- visiting local cultural attractions (such as museums, art galleries)
paikallisissa kulttuurikohteissa käyminen (kuten museot, näyttelyt)
- getting familiar with terrains new to you
tutustuminen uuteen seutuun
- experiencing magnificent landscapes
upeiden maisemien kokeminen
- shopping at marketplaces and boutiques
toreilla ja putiikeissa ostoksilla käynti
- shopping at retail stores
vähittäiskaupoissa ostoksilla käynti
- participating in local events
paikallisiin tapahtumiin osallistuminen
- time spent in nature and outdoors
luonnossa ja ulkoilmassa vietetty aika
- meeting people from the visited place
paikallisten ihmisten tapaaminen
- taking a break in a café
levähtäminen kahvilassa
- enjoying tasty restaurant food
nauttiminen hyvästä ravintolaruoasta

- visiting a spa or using other wellbeing services
kylpylässä käynti tai muiden hyvinvointipalveluiden käyttö
- cycling as a sport performance
pyöräily urheiluasuorituksena
- developing your cycling skills
omien pyöräilytaitojen kehittäminen
- experiencing a specific cycling route
tietyn pyöräilyreitin kokeminen
- meeting other cyclists
muiden pyöräilijöiden tapaaminen
- learning new skills and techniques (bike park, technique track)
uusien taitojen tai tekniikoiden oppiminen (bike park, tekniikkaradat)

13. How strongly the following variables impact your choice of cycling tourism destination? Kuinka vahvasti seuraavat asiat vaikuttavat pyörämatkailukohteet valintaan?

On a scale 1 to 5 asteikolla 1 – 5: 1 = not at all ei lainkaan, 2 = rather little melko vähän, 3 = average keskinkertaisesti, 4 = rather lot melko paljon, 5 = very much erittäin paljon

- good cycling tourism network
hyvä pyörämatkareittiverkosto
- availability of an all-inclusive cycling holiday package
saatavilla oleva all inclusive -pyörämatkapaketti
- good last-minute discount
hyvä viimehetken tarjous
- reviews and recommendations
arvostelut ja suositukset
- cycling route's or region's conspicuousness as cycling destination
pyöräreitin tai -alueen tunnettuus pyörämatkakohteena
- single attraction
yksittäinen nähtävyys
- destinations easy accessibility
matkakohteen helppo saavutettavuus

14. How likely are you to go on a holiday, in which cycling has a significant role, during the next year... Kuinka todennäköisesti lähdet seuraavan vuoden aikana lomamatkalle, johon pyöräily kuuluu merkittävänä osana...

On a scale 1 to 5 asteikolla 1 – 5: 1 = extremely unlikely erittäin epätodennäköisesti, 2 = unlikely epätodennäköisesti, 3 = somewhat likely mahdollisesti, 4 = likely todennäköisesti, 5 = extremely likely erittäin todennäköisesti

- an hour away from home? tunnin päähän kotoa?
- three hours away from home? kolmen tunnin päähän kotoa?
- six hours away from home? 6 tunnin päähän kotoa?
- twelve hours away from home? 12 tunnin päähän kotoa?

15. In which kind of landscape would you wish to cycle during your cycling holiday?

Pick 1-3 most interesting ones Millaisessa maisemassa kävisit mieluiten pyörämatkalla? Valitse 1-3 kiinnostavinta

- archipelago and costal region
saaristo ja rannikko
- expanse
lakeudet
- lake landscape
järvimaisemat
- forests and wilderness
metsät ja erämaat
- hilly regions and ridge ranges
mäkiset alueet / vaaraseutu
- fell
tunturialueet
- cities and urban areas
kaupungit ja taajamat
- cultural landscape and countryside
kulttuuri- ja maaseutumaisemat

16. Estimate the following variables by marking your estimation closer to the extremity, that describes you better as a cycling tourist.

Arvioi seuraavia tekijöitä merkitsemällä arviosi lähemmäs sitä ääripäätä, joka kuvaa parhaiten sinua pyörämatkailijana.

	1	2	3	4	5	
I easily find a suitable cycling tourism destination Löydän helposti sopivan pyörämatkavaihtoehdon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I have difficulties finding a suitable cycling tourism destination Koen sopivan vaihtoehdon löytämisen haasteelliseksi
I prefer guided tours Suosin opastettuja retkiä	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I prefer going self-guided Suosin omatoimisia retkiä
As a cyclist I am a sensualist Pyöräilijänä olen nautiskelija	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I enjoy challenges (extreme) Nautin haasteista (extreme)
I would wish to be more sensualist as a cyclist Pyöräilijänä haluaisin olla enemmän nautiskelija	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	As a cyclist I would wish to look for more challenges Pyöräilijänä haluaisin hakea enemmän haasteita (extreme)
I would wish to do more cycling holidays Haluaisin pyörämatkailla enemmän	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I do cycling holidays a sufficient amount Koen pyörämatkailevani tarpeeksi

I prefer wild camping Suosin omatoimista majoitusta maastossa	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	I prefer staying in a hotel Suosin hotelli majoitusta
I take my own bicycle on my travels Otan oman pyörän mukaan	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	I rent a bicycle Vuokraan pyörän
I rather eat at the campsites Suosin retkiruokailua	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	I prefer eating in restaurants Suosin ravintolassa syömistä
My cycling holidays are short (1 day, no overnight stay) Pyörämatkani ovat lyhyt- kestoisia (1pv, ei yöpymistä)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	My cycling holidays last long (over 7 days) Pyörämatkani ovat pitkäkestoisia (yli 7 pv)
Daily cycling distance is max. 20 km Päivittäinen pyöräilyreitin pituus on max. 20 km	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Daily cycling distance is over 100 km Päivittäinen pyöräilyreitin pituus on yli 100 km
Along the way, I participate in other outdoor activities too Harrastan matkalla muitakin luontoaktiviteetteja	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	I concentrate on cycling only Keskityn vain pyöräilyyn
I plan and book the trip myself Suunnittelen ja varaan matkani itse	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	I go on cycling holidays organized by travel agencies Käytän matkatoimiston järjestämiä pyörämatkoja
I plan the cycling route myself Suunnittelen reitin itse	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	I prefer official marked routes Suosin virallisia viitoitettuja reittejä
I travel alone Matkustan yksin	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	I prefer travelling in a travel party of at least 6 people Matkustan mielelläni matkaseurueessa, jossa on vähintään 6 henkilöä
My cycling trips takes place during the summer season Pyörämatkani ajoittuvat kesäsesongille	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	I do cycling holidays year round Pyörämatkailen ympärivuotisesti

Cycling-friendliness of the services is important to me	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	It is insignificant to me if the the services are cycling-friendly
Palveluiden pyöräystävällisyys on minulle tärkeää		Palveluiden pyöräystävällisyys on minulle samantekevää
The cost of a cycling holiday per day per person (including all costs of the day, such as equipment rentals, guide services, accommodation, meals and transport) should be under 100 €	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	My cycling holiday can cost per day per person (including all costs of the day, such as equipment rentals, guide services, accommodation, meals and transport) over 400 €
Pyörämatkani voi maksaa per päivä/hlö (sisältäen kaikki päivän kulut kuten välinevuokraus oppaan palvelut, majoituksen, ruokailun ja kuljetukset) alle 100 €		Pyörämatkani voi maksaa per päivä/hlö (sisältäen kaikki päivän kulut kuten välinevuokraus, oppaan palvelut, majoituksen, ruokailun ja kuljetukset) yli 400 €

17. How would you estimate your activity of cycling tourism to develop during the next year? Miten arvelet oman pyörämatkailuaktiivisuutesi kehittyvän seuraavan vuoden aikana?

- increase significantly
kasvavan merkittävästi
- increase to some extent
kasvavan jossain määrin
- stay the same
pysyy ennallaan
- decrease to some extent
vähenee jossain määrin
- decrease significantly
vähenee merkittävästi



Photographers:

- 1 William Hook / Unsplash
- 2 Karoliina Jaskari
- 3 Panu Kosonen / Outdoors Uusimaa
- 4 Panu Kosonen / Outdoors Uusimaa
- 5 Ilkka Lariola / Natura Viva
- 6 Nomadic Julien / Unsplash